

Enterprise
Singapore

US CONSUMER **FOOD GUIDE** **2018/2019**



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1. Why Venture into the United States?

The United States (U.S.) remains the top destination for Foreign Direct Investment (FDI) for a variety of reasons, including having the largest consumer market in the world, a predictable and transparent justice system, a productive and highly-skilled workforce, highly developed infrastructure and a business environment that fosters innovation. Similarly, the U.S. is also the largest investor in the world with FDI outflows reaching USD342 billion (SGD462 billion)¹ in 2017.

U.S. Foreign Direct Investment	2015	2016	2017
FDI Inward Flow (<i>billion USD</i>)	465	475	275

Source: *UNCTAD, Latest available data*

The U.S. ranks sixth out of 190 countries for the quality of its business climate² and remains the world's leading economic power for the time being (China is expected to eventually surpass the U.S.). It is the world's third most populous country and is home to New York City, the largest international financial centre.

In terms of FDI into the U.S., the leading sectors were manufacturing (38.8%), financial and insurance activities (25.3%), and wholesale and retail trade (13.6%).

U.S. Main Invested Sectors	2016, in %
Manufacturing	38.8
Financial and insurance activities	25.3
Wholesale and retail trade	13.6
Information and communication	5.1
Professional, scientific and technical services	4.8
Mining and quarrying	4.4
Transport and storage	2.6
Administrative and support service activities	1.8
Real estate	1.6

Source: *OECD Statistics - Latest available data.*

1.1 Largest Consumer Market in the World

The U.S. is the largest economy in the world with GDP of USD20 trillion³ (SGD27 trillion) and the second largest in terms of purchasing power parity. This global economic powerhouse offers the largest consumer base in the world, with a population of 325 million⁴ contributing one-third⁵ of global household consumption.

Consumer spending accounts for more than two-thirds of the economic activity in the U.S. American consumers tend to be diverse in their interests and tastes, with consumers very open to buying foreign products. The basic necessities and values of a U.S. lifestyle are home comfort, food & entertainment and automobiles.

However, the economic downturn in 2008 reshaped the consumer landscape and fundamentally changed the purchasing behaviour of consumers in the US. New customer segments such as

¹ This guidebook uses a currency exchange rate of USD1 = SGD1.35.

² Source: http://unctad.org/en/PublicationsLibrary/wir2014_en.pdf

³ Source: Statistic Times - <https://statisticstimes.com/economy/projected-world-gdp-rankings.php>

⁴ Source: SelectUSA, Opportunities in the US Market - <https://www.selectusa.gov/largest-market>

⁵ Source: World Bank - https://data.worldbank.org/indicator/NE.CON.PRVT.CD?year_high_desc=true

Millennials are more likely to compare prices, seek out discounts, and be more interested in artisan and/or specialty items than past generations.

Despite these new patterns and new customer segments, Americans are still comparatively optimistic about their financial future. Consumer credit reflects the strong sentiments in consumption and retail sectors, with credit-card debt in 2017 reaching a record high of USD1 trillion⁶ (SGD1.35 trillion). In general, the consumer market has fully recovered from the 2008 financial crisis, with 2018 unemployment rates falling below 4% in addition to a growing purchasing power and willingness to spend that is as buoyant as ever.

2018 Country comparison chart – U.S. vs. Singapore⁷

	United States	Singapore
Nominal GDP per capita	USD62,152 (SGD83,905)	USD61,767 (SGD83,385)
Purchasing power parity	9 th place ranking	10 th place ranking
GDP growth rate	2.27%	3.62%
Unemployment rate	3.9%	2.0%
Competitiveness ranking	2 nd place	3 rd place
Corruption Index	75	84
Innovation ranking	4 th place	7 th place

Source: *Statistic Times*

1.2 Growth in Food Services

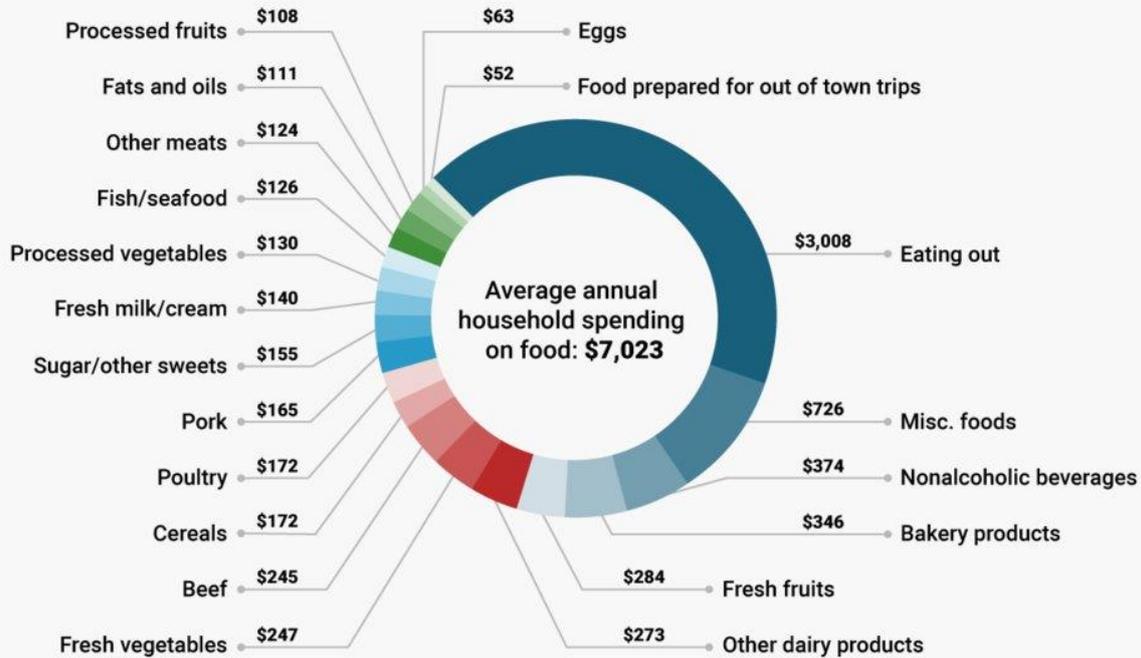
The financial crisis recovery has benefitted the U.S. food services industry, with consumers willing to spend more on dining and retail. The U.S. accounts for 17.8% of the global food services industry value; it expanded by 3.3% in 2016 to reach USD648.8 billion (SGD875.9 billion), and is expected to grow by 17.7% to reach a USD761.6 billion (SGD1.03 trillion) market value by 2021.

The U.S. consumer's strong purchasing power is also reflected in dining services, where spending on eating and drinking grew by nearly 12% from 2015 to 2017. According to the Bureau of Labor Statistics, American households spent an average of USD3,008 (SGD4,061) on restaurant meals annually in 2015, jumping to USD3,365 (SGD4,543) per household in 2017. Quick service and fast food restaurants currently represent the largest segment of the food services industry in the U.S., accounting for 40.4% of the industry total value.

⁶ Source: Consumer Credits, Federal Reserve - <https://www.federalreserve.gov/releases/g19/current/>

⁷ Source: Statistic Times - statisticstimes.com/economy/projected-world-gdp-capita-ranking.php

HOW MUCH AMERICANS SPEND ON FOOD ANNUALLY



SOURCE: Bureau of Labor Statistics

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There was also growth in the groceries and food retail sectors, although this was smaller than the growth in eating out. In 2015, households spent an average of USD4,015 (SGD5,420) annually on groceries. This figure increased by about 9% to USD4,363 (SGD5,890) in 2017⁸.

1.3 Familiar Business Environment for Singaporeans

Singapore and the U.S. have a long history of strong bilateral trade and business relations. Singapore was the 4th fastest⁹ growing source of FDI in the US in 2016 and originates over 80% of the APAC FDI to the U.S. market¹⁰. In 2015 alone, Singapore-owned companies invested USD380 million (SGD513 million) on innovation, research and development in the U.S.

Regarding bilateral economic relations, the US-Singapore Free Trade Agreement (USSFTA) enables Singapore-produced products to enjoy tariff elimination, tariff preferences and waiver of the Merchandise Processing Fee (a fee imposed by the U.S. Customs and Border Protection Agency for most U.S. imports). Since 2004, Singapore's strong bilateral trade with U.S. has recorded a growth of 62% to reach USD45 billion (SGD60.8 billion) in goods traded as of 2016¹¹. In 2017, that figure grew by almost 10% to hit USD49 billion (SGD66.2 billion).

Trade in Goods between U.S. & Singapore (in billions of dollars)

	Exports	Imports	Balance
TOTAL 2017	29,805.9	19,367.5	10,438.4

Source: U.S. Census Bureau

Singapore companies also enjoy favourable advantages because of the similar business environments in the two countries. The use of English, transparent legal and accounting systems, relatively low political risks due to strong checks and balances, and an abundance of skilled talent and

⁸ Source: Bureau of Labor Statistics 2017 - <https://www.bls.gov/news.release/pdf/cesan.pdf>

⁹ Source: Select USA, FDI Singapore - <https://www.selectusa.gov/servlet/servlet.FileDownload?file=015t0000000LKNd>

¹⁰ Source: Why invest in the United States - <https://sg.usembassy.gov/business/getting-started-usa/>

¹¹ Source: US Department of State, US Relations with Singapore - <https://www.state.gov/r/pa/ei/bgn/2798.htm>

a global workforce all provide Singapore companies with the relevant experience to expand across the U.S. market.

1.4 Demographics and Urban Centres

Spread out over 50 states and across over 3.7 million square miles (about 9.5 million square kilometres) of land, the U.S. is rich in diversity. Nowhere is this more evident than in its demographics. Roughly 5.8% of the U.S. population claims Asian ancestry, and a recent study by the PEW Research Center projects that Asians will account for 14% of the U.S. population by 2055.

Population growth trends vary in different regions of the country. Big cities in the South and the West are seeing uptrends in population growth, with increases of more than 10% in southern states and around 7.8% in the West Coast¹² since 2010. The Northeast and New England regions have also shown relatively steady growth in their populations.

According to the U.S. Census Bureau, roughly 80% of the U.S. population currently lives in urban areas (cities), up from 64% in the 1950s. Key gateway cities to the U.S. market are situated predominantly on the coasts (New York, Los Angeles and San Francisco), although the third and fourth largest cities (Chicago and Houston) lie in the Midwest and Southwest respectively.

U.S. Key Gateway City Comparison Chart

	New York	Los Angeles	Chicago	San Francisco
Population (metro)	22,214,083	18,081,569	9,729,825	7,563,460
GDP per capita (2016)	USD70,758 (SGD95,523)	USD66,477 (SGD89,744)	USD59,810 (SGD80,744)	USD86,830 (SGD117,221)
Unemployment rate	4.1%	4.5%	4.4%	3.0%
Asian population	12.7%	11.3%	5.4%	35.3%

Source: *Business Insider, USA Today, BEA*

Other key U.S. cities comparison chart

	Houston	Dallas	Boston	Atlanta	Seattle
Population (metro)	6,191,434	6,887,383	7,601,061	5,712,148	4,269,349
GDP per capita (2016)	USD65,332 (SGD88,198)	USD65,154 (SGD87,958)	USD77,502 (SGD104,628)	USD55,300 (SGD74,655)	USD77,273 (SGD104,319)
Unemployment rate	4.6%	3.8%	3.6%	4.0%	4.1%
Asian population	6.1%	5.9%	7.5%	5.1%	13.7%

Source: *Business Insider, USA Today, BEA*

1.5 Building an International Brand Reputation

The U.S. represents a unique branding opportunity for foreign brands looking to gain global traction and provide cachet back in Singapore or Asia. Companies can build a global brand name and reputation by proving their mettle and achieving success in one of the largest international consumer markets in the world. Expanding business activity in gateway U.S. cities such as New York, Los Angeles, and San Francisco can establish a solid foundation for market validation.

Commensurate to the huge opportunities, companies should expect considerable merchandising and sales expenses and to invest significant capital in brand development, as the U.S. has one of the largest per capita marketing spends.

¹²Source: US Census Bureau - <https://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?src=bkmmk>

US Market Entry Example – Paris Baguette

Paris Baguette (PB), a premium bakery café franchise brand from South Korea, decided it had little choice but to expand overseas for growth as its native market had become saturated with increasing competition from local competitors - 85C and Tous les Jours.

The chain arrived in the U.S. in 2005, opening its first location in Los Angeles due in part to the city's large Korean population. However, as PB expanded across the U.S., the company began to realise that its products catered to a wide range of customers, most notably in Manhattan, where PB appealed to a mix of tourists and locals alike despite their different tastes and preferences.

Fast forward to 2018. PB has grown to over 60 locations in the U.S., including in New York, New Jersey, Georgia, Massachusetts, Nevada, Texas, and California, and has plans to scale to 350 U.S. locations by 2020 as part of its franchising growth strategy.

Part of PB's success can be attributed to its localisation strategy of sending employees to analyse the appetite and dietary culture of a country to better understand the preferences of local consumers before tailoring its products accordingly, including creating versions of local offerings.

PB's analysis of the U.S. bakery market revealed that existing U.S. bakery chains catered primarily to breakfast/morning consumers. This prompted PB to differentiate itself by catering to all-day consumers, offering espressos and pastries in the morning, sandwiches and salads for lunch, and breads and cakes in the evening.

Source: *Business Insider*

1.6 Potential Challenges and Risks

While the potential opportunity the U.S. market represents cannot be overstated, Singapore companies should be aware that the U.S. market can also represent significant challenges. Most notably, the U.S. market is extremely competitive, highly saturated and can be difficult to penetrate. On the other hand, U.S. consumers are accustomed to having many choices and are not necessarily brand loyalists, which can also be viewed as a positive for new market entrants.

In order to overcome these challenges, Singapore companies should be prepared to invest both capital and resources in order to properly research the market, help fund branding & marketing activities which are important to building local brand awareness, and undertake proper due-diligence to understand the competitive landscape and market opportunities.

There are also a number of other socio-economic issues facing the U.S., including decreasing productivity; high public debt; growing socio-economic disparities between the poor/middle class and the super-rich; old and decaying infrastructure; and the increased polarisation in the political sphere, which was accelerated by the 2016 election of Donald Trump to the U.S. presidency. Trump's protectionist trade measures are also threatening the integration of the U.S. in the world economy, which could have negative consequences for global trade in the coming years.

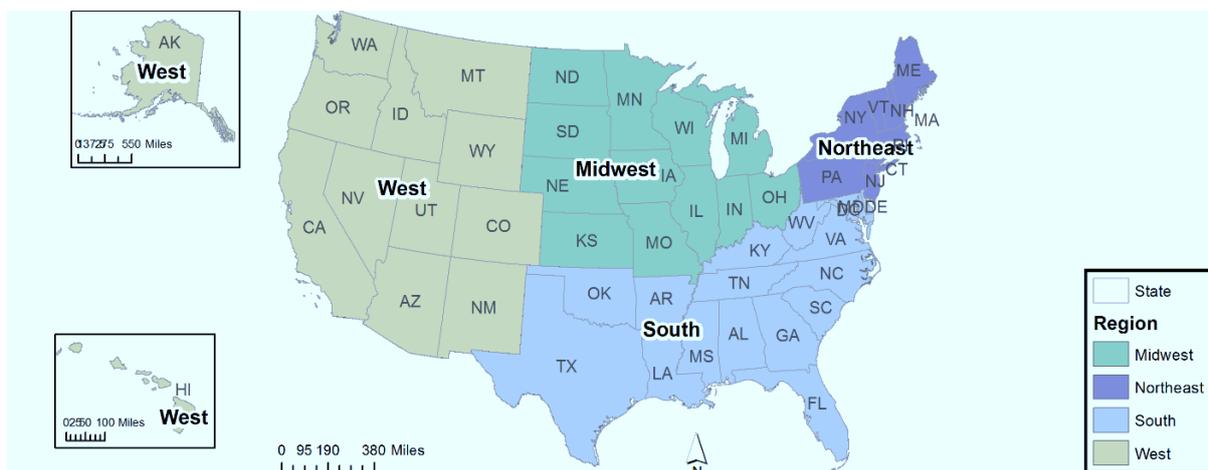
2. Understanding the U.S. Market

2.1 Geography

The U.S. is the fourth largest country in the world covering a total land area of roughly 9.5 million square km¹³. The contiguous U.S. shares land borders with Canada to the North and Mexico to the South. On the two sides of the coast, the Pacific Ocean bounds the west while the Atlantic Ocean is on the east. The U.S. also includes a number of outlying islands such as Hawaii, Puerto Rico, the U.S. Virgin Islands, Guam, etc.

Composed of 50 states, the U.S. is commonly divided geographically into five regions; Northeast, Southeast, Southwest, West, and Midwest. Each region consists of a wide range of landforms and geography. Vegetation and grasslands cover the east with a transition to prairies and then to the Rockies mountain range. The rich variety of geography shapes the diversity in demographics, societal features, and the industry focus across the country.

While some countries have been forced to rely on importing certain food products and ingredients that cannot be grown natively, the U.S. has a highly developed and productive agricultural, farming, and livestock industry that is able to supply the bulk of U.S. consumers' needs and offers a wide range of products, of differing degrees of quality. Nonetheless, specialty items (e.g. Parma ham, truffles) and certain products (e.g. tropical fruits) are typically sourced from overseas due to their uniqueness and quality.

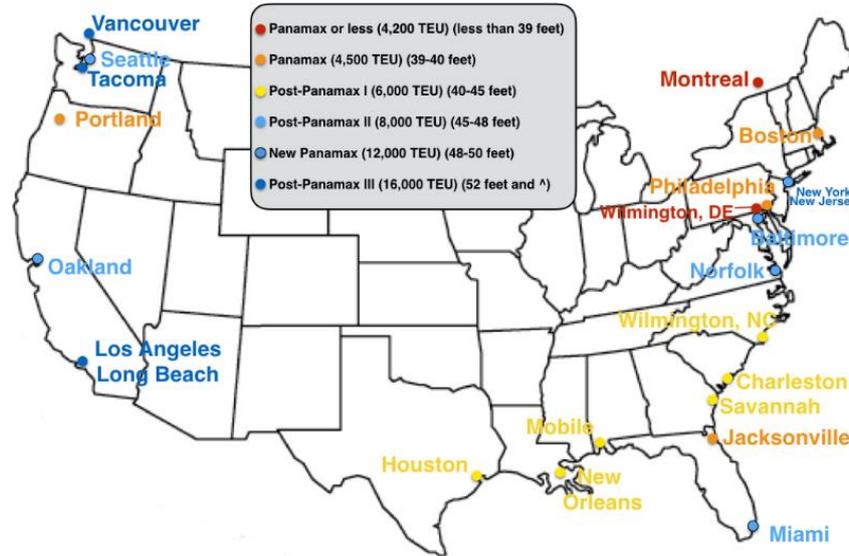


¹³ Source: United Nations Statistics Division, Demographic Yearbook 2005, <https://unstats.un.org/unsd/demographic/products/dyb/DYB2005/Table03.pdf>

2.2 Transportation and Logistics

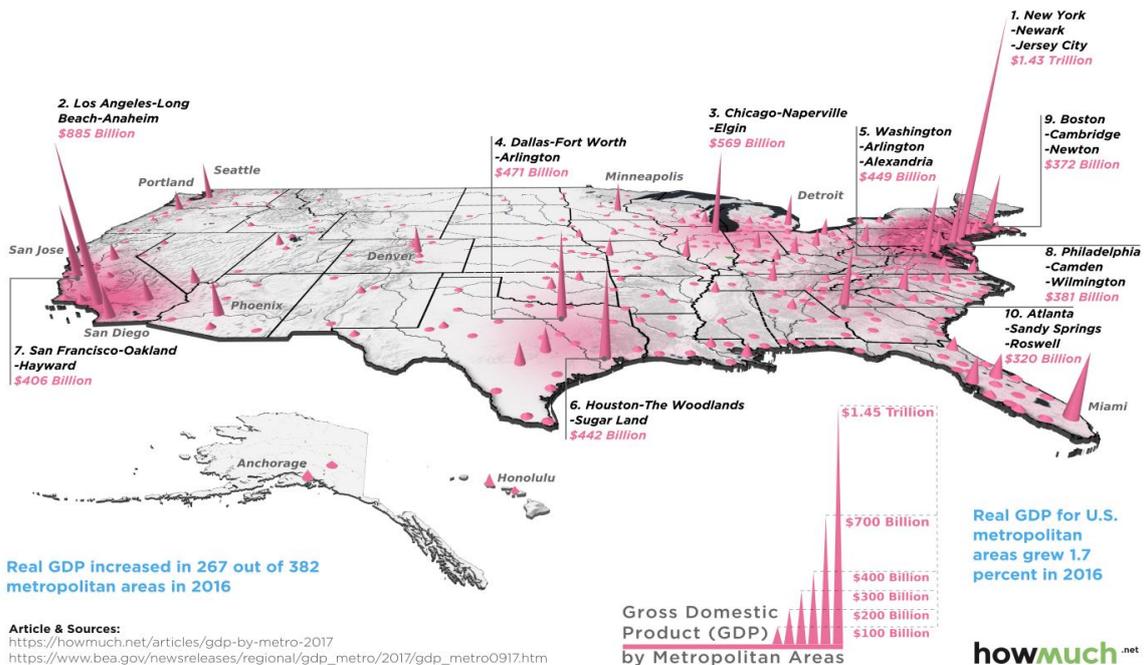
The U.S. has over 300 points of entry across the country which are overseen by the U.S. Customs and Border Protection (CPB) Agency, including numerous ports, airports and land crossings. Deciding on which port of entry will likely depend on your customers' location (east or west coast) and shipping method. However, once products or goods arrive in the U.S., they can be quickly ferried via rail or trucked to almost any point in the contiguous U.S.

U.S. Main Ports of Entry (Seaborne Cargo)



2.3 Demographics

In terms of population, the U.S. is commonly divided into the four major regions of the Northeast, West, South and Midwest. Each region has somewhat differing characteristics in terms of economic drivers, social structure, cultures and lifestyles.



The Northeast is the country's economic powerhouse, contributing 23% of U.S. GDP¹⁴ thanks to its focus relative to other regions on finance and insurance, healthcare, information, and professional sectors. It has a highly-urbanised population and a diversified culture, with 85%¹⁵ of its population residing in urban areas. The New York metropolitan area is the largest metropolitan area in the country with 22 million inhabitants, and other prominent cities include Boston, Philadelphia and Washington D.C.

The West contains the second largest city in the U.S., Los Angeles, as well as other prominent cities such as Denver, Phoenix, San Francisco and Seattle. The main population centre is concentrated in Los Angeles with over 3.83 million inhabitants¹⁶ (and more than 19 million in the metropolitan area). California is the state with largest economy in the U.S., with an annual output of USD2.3 trillion¹⁷ (SGD3.1 trillion). The West has produced jobs at nearly twice the rate¹⁸ of the rest of the country and has a focus on technology, advanced manufacturing, agriculture and entertainment sectors relative to other regions. New industries such as healthcare and real estate are also booming in this region.

Historically heavily reliant on agriculture, the South has now become increasingly industrialised and urbanised since the late 1990s. It has a major focus on oil & gas, automobile manufacturing, utilities and construction sectors. The area contains some of the fastest growing cities in the U.S.; Houston and Dallas have seen over 15% population growth since 2010¹⁹.

The Midwest has the third most populous city in the U.S., the greater Chicago metropolitan area. Regarded as the Wheat Belt and the 'breadbasket' of the country, the Midwest is one of the biggest agricultural regions in the country. The financial sector is also a traditional industry in Chicago, which is home to major financial exchanges for commodities and futures.

¹⁴ Source: US Department of Commerce, Bureau of Economic Analysis, https://www.bea.gov/iTable/index_regional.cfm

¹⁵ Source: US Census Bureau, Urban Areas

¹⁶ Source: Statistical Atlas, Population by Place in the West, <https://statisticalatlas.com/region/West/Population>

¹⁷ Source: <https://www.ibisworld.com/media/2016/03/31/economic-clusters-western-southern-united-states/>

¹⁸ Source: <https://www.ibisworld.com/media/2016/03/31/economic-clusters-western-southern-united-states/>

¹⁹ Source: US Census Bureau, <https://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?src=bkmk>

2.3.1 U.S. States with Highest Purchasing Power (GDP per capita)

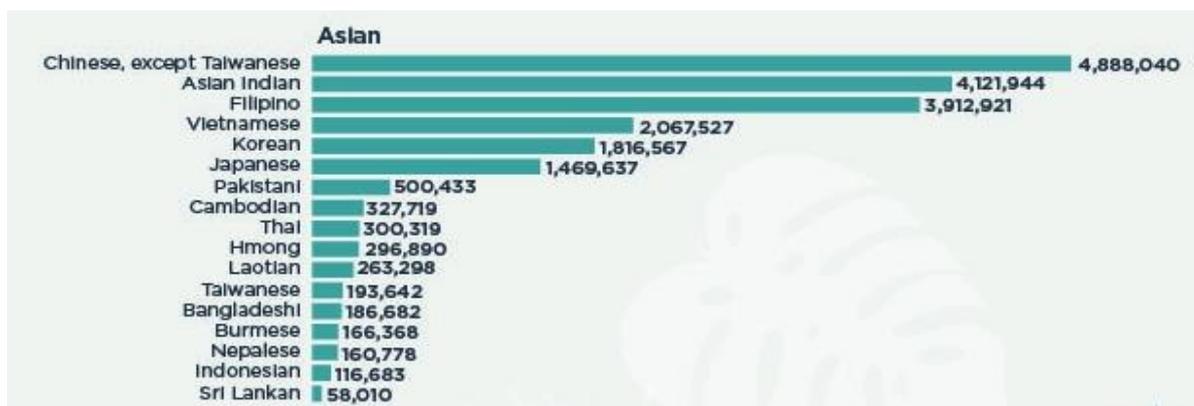
In terms of purchasing power, residents of the Northeast traditionally rank highest, starting with Massachusetts, New York, Connecticut, Delaware, Washington D.C. and New Jersey. On the west coast, states such as California and Washington also rank high in terms of purchasing power.

U.S. States	GDP per capita in 2018 (chained in 2009 dollars)
Massachusetts	USD65,545 (SGD88,486)
New York	USD64,579 (SGD87,182)
Connecticut	USD64,511 (SGD87,090)
Alaska	USD63,971 (SGD86,361)
Delaware	USD63,664 (SGD85,946)
North Dakota	USD62,837 (SGD84,830)
Washington D.C.	USD59,163 (SGD79,870)
Wyoming	USD58,821 (SGD79,408)
California	USD58,619 (SGD79,136)
New Jersey	USD57,084 (SGD77,063)
Washington	USD56,831 (SGD76,722)

Source: [Bureau of Economic Analysis](#) - "Per capita real GDP by state (chained 2009 dollars)"

2.3.2 U.S. States with Largest Asian Populations

Over 20 million Americans trace their roots to more than 20 countries in East Asia, Southeast Asia and the Indian Subcontinent. The largest immigrant group from Asia are the Chinese at 24%, followed by the Indians, the Filipinos, Vietnamese, Korean and Japanese.



Source: [U.S. Census Bureau](#)

Broken down by state, Hawaii is by far the state with the largest Asian population with 54.7% claiming Asian ancestry, followed by California at 14.9%. Other states with sizeable Asian populations include New Jersey, Washington, and New York.

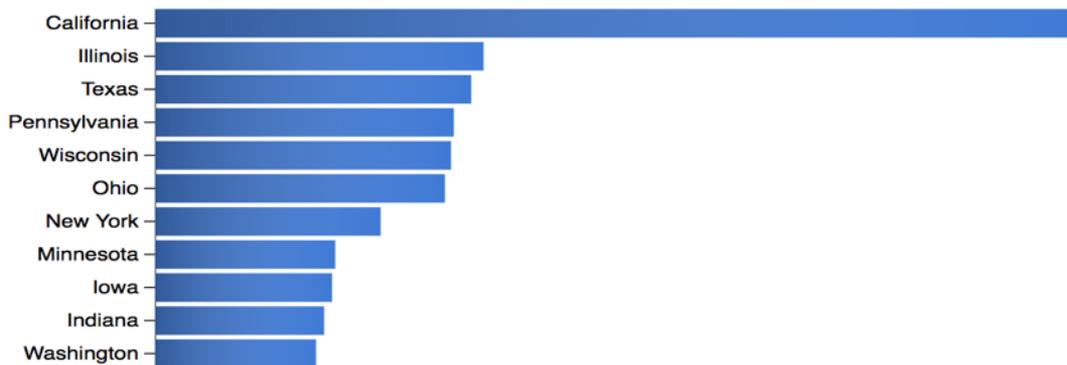
U.S. States	Asian population
Hawaii	54.7%
California	14.9%
New Jersey	9.0%
Nevada	9.0%
Washington	9.0%
New York	8.2%
Alaska	7.1%
Virginia	6.5%
Maryland	6.4%
Massachusetts	6.0%

Source: [US 2010 Census](#)

2.3.3 Geography of Food Manufacturing and Services

The Midwest and West traditionally specialise in the food processing and manufacturing sectors. High employment growth, huge patent growth, and higher numbers of business creation are all major features in these two regions, especially in the cities of California, Los Angeles, Minneapolis, and Minnesota.

Food Processing and Manufacturing Cluster Employment by State, 2016



Source: CareerBuilder

In terms of employment, the state of California employs the greatest number of people in the food processing and manufacturing sectors with over 160,000 workers²⁰ in 2016, nearly three times that of the second-ranked state of Illinois. In terms of wage growth, the Midwestern states of Iowa, North Dakota, and Nebraska are at the top of the table.

With regard to innovation, California led other states in the growth of patent numbers from 2000 to 2015, and is the origin of 14% of the total number of patents in the country. It is also worthwhile to note the negative growth in innovation in Illinois and Minnesota, despite the significant growth in employment in these two states. These two Midwestern states focus more on traditional food manufacturing with fewer efforts in innovation.

²⁰ Source: Top Regions of Food Processing and Manufacturing clusters, Clustermapping, http://www.clustermapping.us/cluster/food_processing_and_manufacturing

2.4 Consumer Profiles and Trends

2.4.1 Distribution of Sectors per Food Dollar

For every USD1 spent by US consumers on domestically produced food in 2016, 36.3 cents went to food services, 15.2 cents to food manufacturers and 12.4 cents to food retailers.²¹



2.4.2 Increasing Popularity of Rating and Review Sites for Food Services Industry

While U.S. consumers used to have minimal buying power to change the pricing and the operations of the food services industry, emerging technologies such as rating applications and review sites have made an impact in recent years. Mobile applications such as Yelp, Foursquare and TripAdvisor are popular among customers in the U.S., where anyone may leave feedback, criticism or praise to be broadcast publicly on the internet about the business. The increased influence of individual customers has necessitated a higher demand for customer relationship management and marketing expenses.

2.4.3 Sustained Demand for Convenient/Fast Food

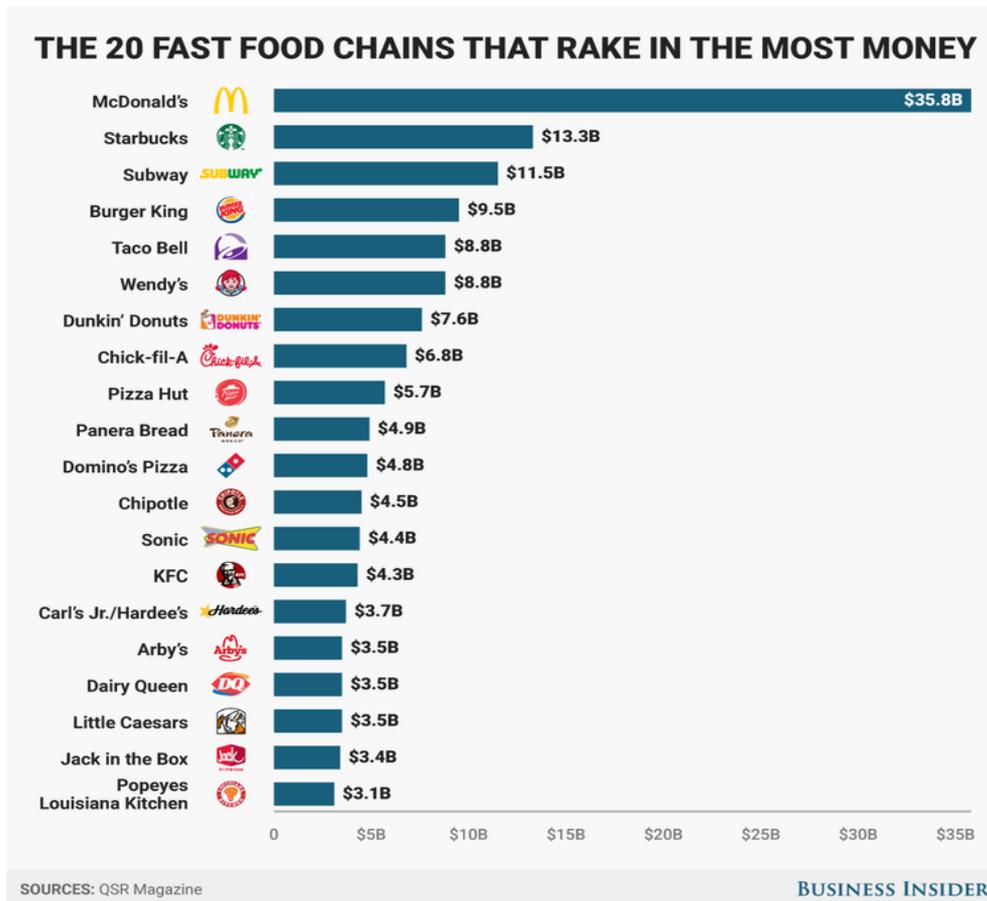
Despite the long debate on the health risks of convenient/fast food, Americans have increased their consumption of food that saves time in preparation. The convenient food culture can be explained in three ways. First, Americans may be constrained by school or work schedules and labour participation and have less time²² to prepare food. Second, from a demand and supply perspective, prices of convenience foods have fallen relative to non-convenience foods. Third, as mentioned in previous sections, sales and marketing efforts in retail sectors have been fierce, and advertisement of convenience food may stimulate relative demand for convenience food.

2.4.4 Dining Out

The trend of convenience food also reflects on the food services sector. According to the U.S. Food and Drug Administration (FDA), Americans consume about one-third of their calories away from home. In other words, one-third of each dollar is spent eating out. In 2016, quick service restaurants and the fast food segments were the most lucrative sectors, with a total revenue of USD261.6 billion (SGD353.2 billion) contributing 40.4% of the entire food industry. Comparatively, traditional dine-in restaurants aggregated USD227.6 billion (SGD307.3 billion), which captured 35.3% of the whole food industry.

²¹ Source: US Department of Agricultural, Economic Research Service, <https://www.ers.usda.gov/data-products/chart-gallery/gallery/chart-detail/?chartId=58354>

²² Source: USDA - https://www.ers.usda.gov/webdocs/publications/80654/err211_summary.pdf?v=42668



2.4.5 Health and Wellness

U.S. consumers are increasingly focused on health and wellness. Consumer attitudes have evolved beyond merely dieting and exercise and are now increasingly focused on personal lifestyle choices, such as food origins (e.g. wholesome, fresh and organic foods) and how the food is processed or produced (e.g. non-GMO, no artificial additives, etc.).

Trends in U.S. consumer's preferences towards healthier consumption:

- **Organic** – The U.S. organic market has continued to expand with 6.7% growth in 2017²³, with the American consumer increasingly seeks organic products (non-GMO/non-pesticide) and many mainstream food brands adding organics to their line of products to maintain their market share in the U.S.
- **Free From** – This is another growing trend which essentially means free from gluten, dairy, lactose, meat and allergens. It is driven by the health-conscious consumer who perceives this offering as more natural and healthier, and is no longer solely associated with intolerance and/or allergies.
- **Plant-based foods** – U.S. consumers are also seeking out more plant-based foods with natural/essential protein, mineral or vitamin content. Examples include whole foods, grains, and plant-based proteins from nuts, seeds and beans as well as ingredients with particular health functionalities. Plant-based meat-substitutes are growing increasingly popular as consumers attempt to find alternatives to meat.

²³ Source: Organic Trade Association – <https://ota.com/news/press-releases/20236>

- **Botanicals** – Another growing trend is the use of botanicals ingredients (such as jamun - black plum, moringa, goji berries, turmeric, maca and/or chaga – medicinal mushrooms), in food categories such as snacks, functional waters and hot drinks. ²⁴
- **Reduction in consumption of meat** – Largely driven by the desire to lead healthier, more sustainable lives, more and more consumers are beginning to reduce their meat consumption, helping to coin the phrase “flexitarians”: people who consume reduced levels of animal products.
- **Veganism** – U.S. supermarket chains and restaurants are starting to take notice of the vegan trend in the U.S. and are increasingly catering to this segment. According to Mintel food & drink analyst Katya Witham, “Veganism is now seen as a trendy lifestyle, with vegan products attracting attention from a much wider audience, namely health and ethically driven, flexi-vegan consumers.”

2.4.6 Packaging

U.S. consumers have become increasingly concerned about the global impact of their purchases, and are demanding that companies use more recycled materials and biodegradable materials in their packaging. Recently, U.S. cities such as San Francisco have banned the use of plastic bags and straws, part of a growing U.S. consumer backlash against the plastics consumption, which can impact their decisions when choosing which products to purchase at the supermarket.

U.S. consumers are also seeking assurance on process techniques. Manufacturers can take advantage of this opportunity with more explanation, known as clean labelling. Food manufacturers should take note of clean labelling as an important way to attract these customers.

2.4.7 Eating Local

U.S. consumers are increasingly seeking greater authenticity and transparency of food sources and options, preferring locally sourced ingredients that support sustainable consumption and local farming traditions. They are even willing to pay a little more for the confidence that their food purchases help to create jobs and promote local economies, safeguard the environment, and support proper animal treatment (e.g. cage free rearing).

Singapore companies can mitigate this “eat local” trend by being open and transparent about where you source your ingredients from, conveying your own “local Singaporean” story, since authenticity is also highly valued amongst U.S. consumers.

2.4.8 Ethnic Foods

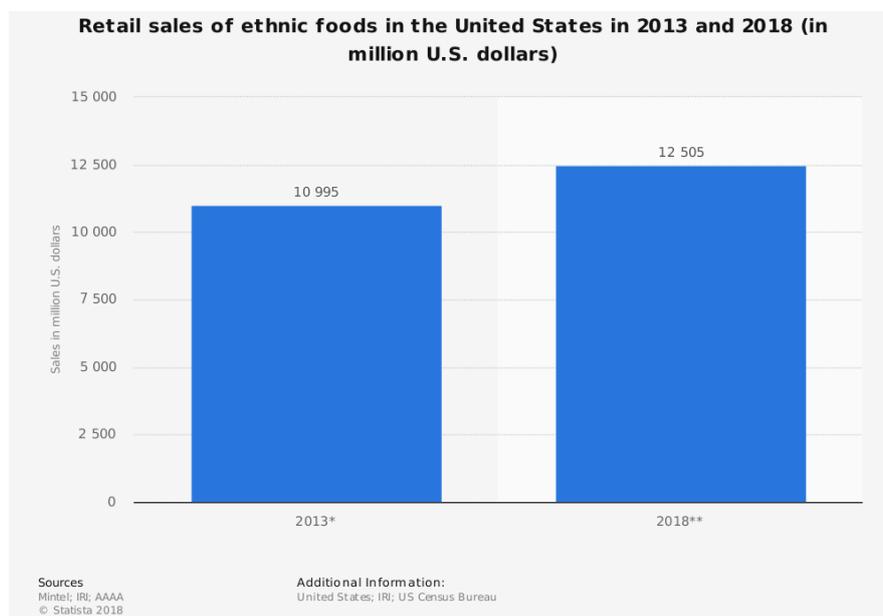
U.S. consumers are increasingly familiar with ethnic cuisine and food products especially Asian flavours, given the high numbers of Chinese, Japanese, Korean, Vietnamese and Thai restaurants throughout the U.S. that are now part of mainstream American cuisine. The coasts of the U.S. tend to have more diversity and hence more access to Asian food products, while there tends to be less awareness in the middle and southern regions of the U.S.

While U.S. consumers are curious about Asian foods, the average consumer typically cannot distinguish flavours as well since the palate may not be acclimated to Asian cuisines. This is why some ethnic dishes tend to be “watered down” to suit the American palate.

Spicy flavours tend to do well in the U.S., in part due to the abundance of Mexican cuisine establishments. Changing demographics are also behind the increase in ethnic food consumption, particularly as the purchasing power of the millennial demographic increases and companies target growing Hispanic and Asian populations.

²⁴ Source: FoodDive - 6 major food trends to watch in 2018

Retail sales from ethnic foods in the U.S. have increased from just under USD11 billion (SGD14.9 billion) in 2013 to over USD12.5 billion (SGD16.9 billion) in 2018, reflecting a growth rate of over 13.5% over the last 5-year period.



2.5 Channel Trends

U.S. consumers continue in large part to purchase food & beverage products through traditional channels such as hypermarkets, supermarkets (including ethnic supermarkets), grocery stores, convenience stores, and increasing from non-traditional online sources. According to Nielsen, nearly 30% of Americans buy groceries online, and this number is expected to grow to 70% in less than 10 years. Nearly a quarter of Americans (24%) shop for consumer goods on their phone, and this number spikes to 40% for millennial shoppers, who are now the largest generational consumer segment. 30% of millennials are already shopping via smart home devices (e.g. Amazon's Alexa), and this number only continues to grow.

U.S. consumers are also seeking restaurant-quality food at home, pushing more innovation in consumer goods that tap into this need by providing recipes on packaging, pre-assembled food delivery, and blending the lines between restaurant and retail:

- **Meal-in-a-box model** – weekly subscription/home delivery service that includes a recipe and all the ingredients you need to cook a meal at home (e.g. Blue Apron).
- **Fresh meal kits** – (e.g. Peapod) available in supermarkets or gyms (e.g. Kettlebell) that are portioned out and easy to prepare and cook at home.

There is also a growing trend of experimental channels that serve a combination of convenience, novelty or lifestyle choices and are increasing in popularity:

- **Subscription box model** – subscribers receive a box full of different food & beverage products typically focused on a theme (category, country, or health focus). Since this is typically a one-time opportunity, the box serves primarily as a marketing tool to help brands gain awareness. Popular subscription box model companies include Taste The Word, MunchPak, Universal Yums, TryTreats, TopMunch, and Snack Crate.
- **New offline channels** – food startups are also increasingly targeting the workplace (B2B) by providing snack packs delivered straight to offices (e.g. Snack Nation) and/or coffee, tea, and beverage services as office amenities (e.g. Stumptown, Bevi)

Similarly, the food services industry is seeing innovations in food order/delivery, as well as a new breed of restaurants directly from food services brands:

- **Smartphone delivery/online apps** – new delivery platforms such as GrubHub and UberEats are expanding choice and increasing convenience, allowing customers to order from a wide array of restaurants with a single tap on their mobile phones. Making it easier to order food directly from a variety of restaurants removes the need for cooking or shopping altogether.
- **Food brands moving downstream** – There is also a growing trend of fast-moving consumer goods (FMCG) brands, such as Kellogg’s and Barilla, opening physical stores/restaurants as a way to grow revenue streams and find novel ways to interact with their consumers.

2.6 Food Industry Overview/Opportunities

According to Nielsen, FMCG dollar performance across all categories grew by 3.47% to reach USD1.054 trillion (SGD1.423 billion), driven by growth in e-commerce and fresh foods, with fresh food sales alone reaching USD178 billion (SGD240 billion) in 2017.

TOTAL FMCG DOLLAR PERFORMANCE

Growth bolstered by e-commerce and fresh foods

\$ Sales	Current (Trillions)	Year-Ago (Trillions)	Growth
TOTAL FMCG MARKET Nielsen All Outlets Combined (xAOC) including grocery stores, drug stores, mass merchandisers, select dollar stores, select warehouse clubs and Nielsen-covered measures of Convenience, Pet, Military, BevAl & E-commerce	\$1.054T	\$1.019T	+3.47%

Source: *Nielsen*

For the group of specialty foods categories, commonly referred to as unique and high-value food items made in small quantities using high-quality ingredients, there has been strong growth across all categories versus its non-specialty counterparts, as consumers continue to seek out quality in their food choices. Growth in specialty foods has been especially strong in sectors aligned with health and wellness, freshness, and “better for you” options. From 2014 to 2016, total unit sales for specialty foods grew by 13.1%. In comparison, all food retail sales grew by an only 2.3%.²⁵

Findings from Specialty Food Association 2017 report:

- *Specialty beverage sales are growing faster than food sales driven by Water, Refrigerated Juices and Functional Beverages, Shelf-Stable and Refrigerated RTD Tea and Coffee.*
- *Shelf-stable specialty foods accounted for 61 percent (in 2016) of the total specialty food market, led by strong growth performance in categories like Water, Wellness Bars and Gels, and Nut and Seed Butters.*
- *Snacking segment has seen double-digit growth across most categories, bringing it to 28 percent of the total specialty food market.*

In terms of retail sales by category, the top two categories were “cheese and plant-based cheese” and “frozen and refrigerated meat, poultry, and seafood”; categories in which Singapore companies are not typically active. However, they were followed by the “snacks” category (chips, pretzels, and snacks) at 6% of the market share, “coffee and cocoa” at 5.4%, “bread and baked goods” at 4.7%, and “chocolate and other confectionary” at 3.7%.

²⁵ Source: Specialty Food Association 2017 Report / Mintel

Retail Sales of Specialty Food: Top 10 Categories

In millions of dollars	2016	% Share	% Change 2014-16
Cheese and Plant-Based Cheese	\$4,422	7.5%	12.4%
Frozen and Refrigerated Meat, Poultry, and Seafood	\$3,738	6.3%	11.4%
Chips, Pretzels, and Snacks	\$3,570	6.0%	13.6%
Coffee and Cocoa (non-RTD)	\$3,223	5.4%	12.1%
Bread and Baked Goods	\$2,798	4.7%	15.8%
Chocolate and Other Confectionery	\$2,195	3.7%	10.0%
Yogurt and Kefir	\$2,042	3.4%	27.2%
Frozen Lunch and Dinner Entrees	\$2,017	3.4%	18.1%
Refrigerated Lunch and Dinner Entrées	\$1,963	3.3%	33.0%
Condiments, Dressings, and Marinades	\$1,928	3.3%	8.1%

Source: *Specialty Food Association*

2.6.1 Food Retail – Subsector Opportunities:

- **Snacks** – represents an opportunity for new market entrants, as changing meal times are propelling demand for convenient, healthy, more satisfying and sustaining snacks. Also, a growing segment within snacks are now seen as meal replacers and this is being managed through portion size/packaging and protein content.
- **Chocolate and other confectionery** – this is another category that has shown increased potential for new market entrants, posting a CAGR of 2.8% since 2012 to reach USD19 billion (SGD25.7 billion) in 2017, according to Euromonitor. While this market has been traditionally dominated by the likes of Hershey, Mars, Lindt, etc., there is growing demand for craft and artisanal chocolate and confectionary products as consumers seek out products using natural and wholesome ingredients.

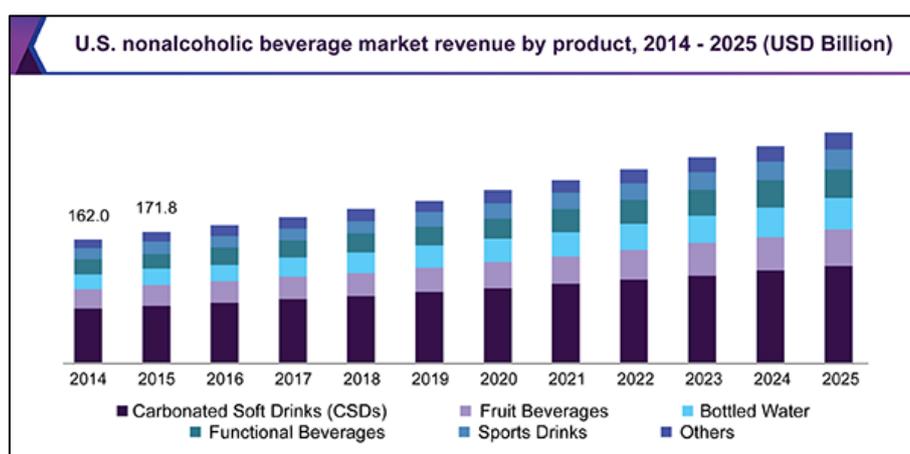
Market shares Chocolate Confectionery in North America

As %	FY13	FY14	FY15	FY16	FY17
Hershey	29.3	29.5	29.9	29.5	29.5
Mars	24.4	24.1	24.3	24.5	24.5
Lindt	8.5	9.1	9.2	9.4	9.3
Nestlé	9.6	9.3	8.9	8.6	8.5
Ferrero	2.7	2.7	2.8	3.0	3.3
Mondelez	3.4	3.4	3.1	3.0	3.2
Pladis	3.0	3.0	2.7	2.8	2.7

Source: Euromonitor, Vontobel Equity Research

- **Premixes** – BusinessWire forecasts that the global vitamin & mineral premixes market, which is currently valued at USD6.93 billion (SGD9.36 billion), is projected to grow to USD8.93 billion (SGD12.06 billion) by 2022, at a CAGR of 5.25%. The growth of this market in the U.S. is attributed to growing demand for fortified food & beverage products, a growing need for food enrichment due to high processing levels of food products, and the customised requirements of the individual user looking to supplement their daily vitamin and mineral intake. This is a category that represents an opportunity for foreign entrants; however, strict regulatory requirements for the food segment might be an obstacle for those entrants.

- **Sauces** – The U.S. sauce market is valued at over USD24 billion (SGD32.4 billion) and is expected to grow at roughly 2% over next 5 years²⁶. This is the result of the growing perception that traditional sauces and condiments (e.g. ketchup) are an unnecessary and unhealthy addition to many foods, and a growing demand for sauces that are marketed as organic/non-GMO and healthy, low-sodium, low-sugar, no gluten varieties supporting restrictive diets. Hot sauces and staple sauces using diverse flavour profiles can also target the multi-cultural segment (e.g. mayonnaise brands offering wasabi, garlic, horseradish, and ginger flavours).
- **Functional beverages** – The functional beverage market (non-alcoholic drinks which provide specific health benefits and contain non-traditional ingredients like minerals, vitamins, amino acids or added raw fruits) has developed beyond being a niche category of drinks meant for better health and wellbeing. It represents the largest single category for growth in the U.S. beverage segment moving forward.



Source: Natural Products Insider - Market Overview: Functional Beverage Innovation

New functional beverages (e.g. sports drinks, ready-to-drink tea and designer water) have added a new dimension to the earlier definition, catering to a wide variety of consumers who are taste- and ingredient-conscious, as well as sophisticated about their overall food consumption.

2.7 Emerging Opportunities

2.7.1 Growth of Startup Food Brands

In the U.S., food & beverage startups are increasingly setting the pace of innovation and stealing share from established brands in the process, particularly around the areas of plant-based protein, personalised nutrition and food technology. This trend extends across almost every category in food retail (as depicted below):

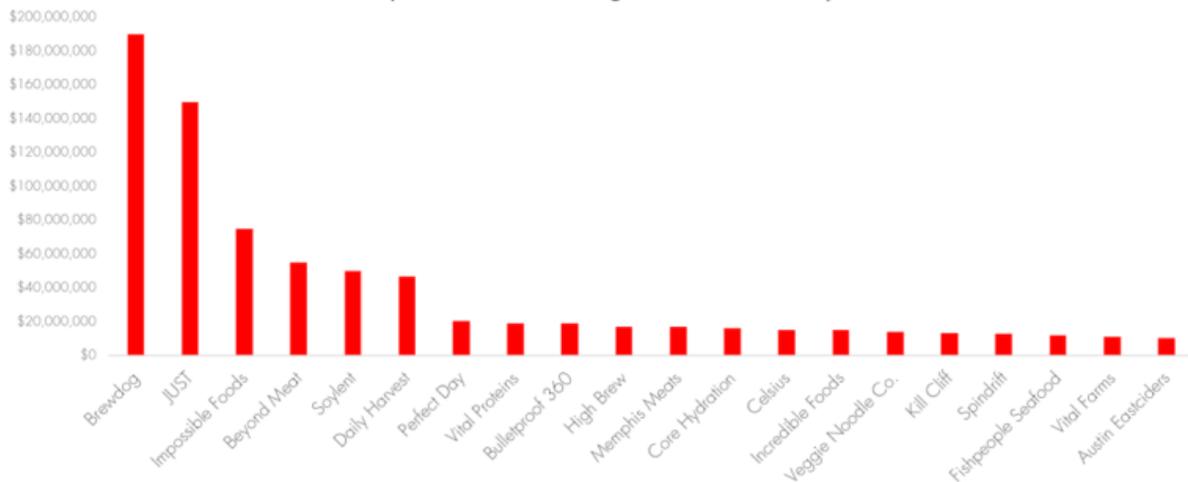
²⁶ Source: Packaged Facts - <https://www.packagedfacts.com/Condiments-Sauces-Retail-Trends-Opportunities-10952710/>

FOOD & BEVERAGE BRANDS OF THE FUTURE



As a result, more and more investors are taking notice and investing in U.S. food startups, with over 450 investments in food startups in 2017. Some of the more notable investments include Brewdog (craft beer) which has raised over USD300 million (SGD405 million), JUST (sustainable water), Impossible Foods (plant-based meat and cheese) and Beyond Meat (plant-based meat).

2017 Top 20 Food & Beverage VC Investments by Brand



While venture capital funding in food & beverage has traditionally focused on food tech and food retail brands, there has been a growing trend for private equity/venture capital funding in food services, such as coffee chains (e.g. BlueBottle and Stumptown), ice cream chains (e.g. Ample Hills), salad chains (e.g. Sweetgreens), and food delivery (e.g. GrubHub).

2.7.2 Venture Capital (VC)

VC funding for the food & beverage sector has increased exponentially in the U.S. to reach USD1.08 billion (SGD1.46 billion) in 2017, with a median check size of USD4.25 million (SGD5.74 million) and an average check size of USD10.9 million²⁷ (SGD14.7 million). Following on this trend, some of the world's largest U.S. food corporations (including General Mills, Campbell's Soup, Kellogg's, Hain Celestial, and Tyson Foods) have launched their own VC funds to invest in promising food & beverage-related startups.

Major food companies launch investment vehicles

A timeline of recently launched venture funds/incubators by date of initial announcement



Examples of U.S. Corporate Food VC funds:

- **General Mills 301 Inc.** – General Mills VC fund (investments include Beyond Meat – alternate protein)
- **Kellogg's eighteen94 Capital** – Kellogg Company's VC, which is managed externally in partnership with Touchdown Ventures.
- **Campbell's Soup's Acre Venture Partners** – Campbell's independently operated USD125 million (SGD169 million) VC fund.
- **Hain Celestial's Cultivate Ventures** – Hain's VC fund that invests in lifestyle food brands, smaller portfolio brands, and concepts with the goal of acquisition.

In addition to food corporate VCs, there is a growing number of unaffiliated VCs focusing exclusively on the food sector. Some examples include:

- **Almanac Ventures** – a New York-based VC that invested in California-based food brand Nona Lim (founded by a Singaporean)
- **Continental Grains Ventures** – Investments to seed and grow start-up businesses that are using cutting-edge technology to define the future of food. Has invested in Impossible Foods, alongside Temasek.
- **First Beverage Group** – Los Angeles-based VC firm that invests in beverage focused startups, with at least USD1 million (SGD1.35 million) revenue.
- **Gastro Ventures** – focus on "high-touch" food & beverage opportunities that fall outside the target of traditional investment models.²⁸

²⁷ Source: <https://foodtechconnect.com/2018/05/01/2017-u-s-food-beverage-startup-investment-report/>

²⁸ Source: <https://www.mydrinkbeverages.com/top-venture-capital-funds-for-food-and-beverage-industry>

2.7.3 Raising Capital in the U.S.

Singapore food brands considering raising venture capital in the U.S. should take note that U.S. VCs traditionally look out for and focus on:

- Traction – proof of concept and a successful U.S. track record
- U.S. presence – your company has a permanent team based in the U.S.
- Type – a focus on “innovative” food companies in categories with high growth trajectory and/or concepts that can scale quickly.

2.7.4 Accelerators/Incubators

Another channel for Singapore food brands (typically early-stage startups) looking to scale quickly in the U.S. is to leverage the growing network of food startup accelerators/incubators that offer a range of benefits in exchange for a fee or equity stake. These benefits include mentorship, training and funding (often in exchange for a portion of equity), co-working space, and introductions to investors looking to fund startup businesses in a particular sector (e.g. food).

The following is a list of some of the more established accelerators in the US:

AccelFoods	New York	Accelerator/Early stage VC looking for innovative food products in markets of at least USD100 million (SGD135 million)
Canvas	Global	Marriott’s concept lab for incubating entrepreneurial food and drink ideas.
Chobani Food Incubator	Global	Low-risk, low-cost, equity-free incubator option for CPG startups that don’t want to give up equity but are looking to scale and build strong mentorship relationships from Chobani’s leaders in operations, finance, sales, and marketing
Food-X	New York	Works with startups across the food chain
FoodFutureCo	New York	Targeted at startups with more than USD1 million (SGD1.35 million) in revenues with the idea of helping food businesses scale
Plug and Play	Sunnyvale	Food programme partners with Molson Coors, Hershey’s, and PepsiCo
PilotWorks	New York	Operates culinary incubators across the US (including Brooklyn, Chicago, Dallas, etc.), providing specialized products and services to help entrepreneurs bring new companies and ideas to market.
RevTech Accelerator	Dallas	Venture accelerator focused on restaurant, retail, and hospitality.
SKU	Austin	Austin based consumer products accelerator
Terra	San Francisco	Food and ag accelerator affiliated with KitchenTown (incubator & commercial production facility)

3. Getting Started

3.1 Incorporation

Branch Office. Foreign companies are not required to conduct business in the U.S. through a U.S. entity and can instead operate as a branch office. However, it is typically not advised to do so for tax and liability reasons.

Unlike a subsidiary, a branch office is not a separate legal entity from the parent company, and the entire company is hence considered to be “doing business” in the U.S. Rather than limiting taxation to the income of the branch office, this would subject the company to taxation on all income earned.

Corporations. Most Singapore companies instead choose to do business in the U.S. as corporations, in order to limit their liability and avoid being taxed on their Singaporean assets.

a) Deciding on whether you need to incorporate your business in the U.S.

Singapore companies that are only planning to sell their products or goods into the U.S., either online or through third parties (distributor or wholesaler), do not need to file for incorporation in the U.S. However, some companies may choose to do so for the purposes of establishing a U.S. business address and/or if the product to be sold is regulated by the FDA.

If your company is planning to set up a physical presence in the U.S. (such as a retail outlet, an office or by hiring employees), then you could be required to have a registered U.S. business and hence, to incorporate in the state of your choosing. For example, a landlord could require some evidence of a U.S. legal presence.

Since each business will likely have different objectives, it is important to look at incorporation in the context of:

- (i) Your overall business plans (e.g. flagship location, franchising)
- (ii) Incorporation laws by state
- (iii) Tax considerations (how you plan to structure your US entity)
- (iv) Ability to scale
- (v) Ability to manage your legal entity (e.g. subsidiary) from overseas
- (vi) Singapore companies should also be mindful that some states and cities offer incentives (corporate or sales tax breaks) to encourage businesses to establish themselves there.

b) Incorporating a foreign business in the U.S.

For the purposes of the U.S. market, Singapore companies will need to incorporate their business at the state level (there is no incorporation at the federal level in the U.S.). The process varies from state to state but generally involves two steps:

- (i) Applying to register in that particular state, and;
- (ii) Establishing a registered agent* with a valid address in that state (do note that P.O. boxes are not permitted).

* A registered agent can be either the business owner or another person who is authorised to receive legal papers on behalf of the business, such as your lawyer. There are companies in most states that offer for-hire registered agent services.

c) Types of business structures

Non-U.S. citizens typically choose to incorporate as either an LLC (Limited Liability Company) or as a C-Corp (C Corporation). A U.S. lawyer will be able to best advise on a case-by-case basis whether an

LLC and/or C-Corp is the best business structure for your business needs, and/or an alternate structure. The following are general descriptions provided by Findlaw²⁹:

- A Corporation is an entity that is separate and distinct from their owners. In a corporate business structure, shareholders have the right to participate in profits, but are not held personally/financially liable for the company's debts.
- A limited liability company, also known as an LLC, is a business structure that has features similar to both corporations and partnerships. LLCs protect owners from certain liabilities, including business debts, while the legal structure allows for a flexible management arrangement.

One key advantage of operating a business through a legal entity such as a corporation is the ability to limit liability. This is important should you encounter a situation where your business entity were to become the subject of a lawsuit, legal claim and/or if you were to declare insolvency/bankruptcy.

When deciding on the appropriate business structure, it is important to note that:

- The U.S. has a federal system of government in which power is shared between the federal government and state governments. This means that in addition to Federal Corporate income tax, Corporations can also have to pay State Corporation income tax. States without Corporation income tax could have a Corporation Franchise tax.
- Since LLCs are commonly used as pass-through entities from a tax point of view, a Singaporean company can run the risk of being double taxed (for both its US and Singaporean assets) and should seek clarity from a US tax lawyer on the risks this may pose to your Singaporean assets.
- Singaporeans cannot retain shares in an S corporation, a special structure of business ownership by which the business is able to avoid double taxation because it is not required to pay corporate income tax on the profits of the company. This is because business income is reported on personal U.S. income tax returns.

d) Choosing which state to incorporate in

Foreign companies often choose to form a C-Corp or LLC in the state of Delaware because it is considered to be business-friendly to foreign companies. Costs for franchise tax and other costs are lower, and the Delaware Court of Chancery has extensive expertise in corporate law. However, if you are planning to have an office or physical presence in a state other than Delaware and/or most of your business activity/customers are in that particular state, then you might also wish to consider incorporating in said state.

In the event that your company operates in more than one state, such as offices and/or warehouses, you may elect to incorporate in any of these states. However, you are required to register your business in the other states in which you operate; this process is called foreign qualification (also known as Certificate of Authority or Registration) and can be applied for with the help of a lawyer and/or through that state's online registration portal.

3.2 Paying U.S. Corporate and Income Taxes

The key forms of taxes in the U.S. are personal income tax (for individuals), corporate income taxes (federal, state, and city), employment taxes, sales and use taxes, real estate property tax and business license taxes. In the case of state and city, this on a case-by-case basis.

Corporate income taxes are assessed at the federal and, in most cases, state level. Federal nominal corporate tax rate in the U.S. is a flat 21%, but state corporate income tax rates vary by state.

²⁹ Source: <https://smallbusiness.findlaw.com/incorporation-and-legal-structures/corporation-versus-llc.html>

The IRS (Internal Revenue Service) will tax any non-resident Singaporean business owner operating a business in the US on any income that is sourced in the US. You may also be required to pay an annual franchise tax to the state where your business is incorporated.

- **International sellers with no physical presence in the U.S., but who make sales in the U.S.**
 - As of June 21, 2018, the Supreme Court of the US. allowed states to require online sellers with an “economic nexus” in their state to comply with that state’s sales tax requirements.³⁰ This means that if a seller, no matter where they are located, makes a certain dollar amount of sales in a state, or a certain number of transactions with buyers in that state, then they are required to collect sales tax in that state. About half the states in the U.S. currently have economic nexus laws ³¹.

To share an example: Any seller (U.S.-based or international) who makes more than USD100,000 in sales in the state of Kentucky in the current or previous calendar year, or who makes more than 200 sales transactions in the state in the current or previous calendar year, is required to comply with Kentucky sales tax laws. Compliance means registering for a Kentucky sales tax permit and collecting sales tax from any buyers in Kentucky.

- **Determining your tax residency** – You are a resident alien of the United States for tax purposes if you meet either the green card test (you are a lawful permanent resident of the U.S. at any time during the calendar year Jan. 1 – Dec. 31) or the substantial presence test for the calendar year (31 days during the current year, and 183 days during the 3-year period that includes the current year and the 2 years immediately before that).³²
- **Corporate income tax** – If you have formed a new entity in the U.S., you will need to apply to the IRS for an Employer Identification Number (EIN). The EIN identifies the company for federal taxation, payroll, and payment categorisation purposes, and is needed to open a bank account. In addition to the state where you are incorporated (often the state of Delaware), the U.S. entity should also register with the tax or revenue department in the state(s) in which the company will be doing business.
- **Personal income tax** – If you are a Singaporean business owner legally residing or operating a business in the US, you will require an Individual Taxpayer Identification Number (ITIN) in order to file/pay taxes. The IRS issues these 9-digit tax processing numbers to individuals who are ineligible for a Social Security Number (SSN), including resident and non-resident aliens and foreign nationals, but are required to pay taxes.³³

3.3 Trademarks, Patent and Intellectual Property (IP) Protection

When entering the U.S., Singapore companies and/or IP brand owners should consider hiring a U.S. lawyer to research whether their product, logo, brand, slogan, etc. might infringe on any existing patent or IP registration, like a trademark. If not, you should consider applying for trademark and/or patent registration (if your product has a unique proprietary invention) as a way to protect your brand IP and to avoid any potential legal disputes.

The application should be the first step if you plan to sell your products in the U.S., as the process can take up to a year or longer and obtaining trademark or patent protection requires compliance with U.S. laws. Even if you are unsure whether you will sell your products and/or open an establishment in the U.S., you can also consider taking the pre-emptive step of registering your IP in the U.S. so as to protect your trademark for a period of 10 years (with 10-year renewal terms). Registrants must file an affidavit within 5 to 6 years stating the trademark is still in use.

³⁰ Source: <https://blog.taxjar.com/international-sellers-deal-sales-tax-u-s/>

³¹ Source: <https://blog.taxjar.com/economic-nexus-laws/>

³² Source: <https://www.irs.gov/individuals/international-taxpayers/determining-alien-tax-status>

³³ Source: <https://www.irs.gov/individuals/international-taxpayers/taxation-of-nonresident-alien>

You may file a trademark application on your own, but if you want someone to help or give you legal advice, you need to hire an experienced trademark attorney who is licensed to practice law in the United States.

- *A trademark is a word, name, symbol, or device that is used in trade with goods to indicate the source of the goods and to distinguish them from the goods of others. Trademark rights may be used to prevent others from using a confusingly similar mark, but not to prevent others from making the same goods or from selling the same goods or services under a clearly different mark.*
- *A patent for an invention is the grant of a property right to the inventor, issued by the United States Patent and Trademark Office. The right conferred by the patent grant is, in the language of the statute and of the grant itself, “the right to exclude others from making, using, offering for sale, or selling” the invention in the United States or “importing” the invention into the United States. What is granted is not the right to make, use, offer for sale, sell or import, but the right to exclude others from making, using, offering for sale, selling or importing the invention. Once a patent is issued, the patentee must enforce the patent without aid of the USPTO.³⁴*

³⁴ Source: <https://www.uspto.gov/trademarks-getting-started/trademark-basics>

3.4 Staffing/Hiring

a) Posting overseas staff

If you are planning to post overseas staff, or yourself, to the U.S. for a period of time to help get your business off the ground, train staff and/or to manage your U.S. operations, there are some important factors that you will need to consider:

- (i) Legal status – applying for a business visa
- (ii) Remuneration/Benefits – adjusting to U.S. compensation practices
- (iii) Health insurance – not required by law, but considered an essential part of an employment compensation package
- (iv) Compliance – complying with local employment taxes, filings, and labor laws

b) U.S. business visas for non-U.S. persons

Planning for U.S. visa requirements will need to be factored into the process of how you structure your U.S. operations. For example, how you plan to pay your key employees can affect the structure of your U.S. operations, as non-U.S. nationals cannot be paid from a U.S. source for services rendered unless they have a U.S. visa that permits it.

There are several business visas available to Singaporeans meeting the corresponding requirements. The following are the most common examples:

- **ESTA (Tourist Visa):** The visa waiver programme is a U.S. government programme that enables citizens and nationals from 38 countries (including Singapore) to enter the U.S. for business or visitor purposes for up to 90 days without obtaining a visa. The advantage of entering the U.S. under the visa waiver programme is that you can travel to the U.S. on short notice without obtaining a visa. Visa Waiver Travelers are required to have an approved travel authorisation (ESTA) to enter the United States by air or sea³⁵.
- **B-1 Visitors Visa:** You are not permitted to work for and be paid by any U.S. source. However, you can negotiate contracts, consult with business associates, litigate or arbitrate, and participate in conventions and seminars, do research, and engage in certain other permitted activities in the U.S. Maximum stay per period is 6 months.
- **L-1 Visa:** For a foreign national “executive”, “manager” or “person of specialised knowledge” who has worked for an enterprise outside the U.S. for at least 1 year within the past 3 years in one of these capacities, and is now getting temporarily transferred to that enterprise’s U.S. subsidiary, branch office or affiliate in a comparable capacity. Extensive documentation is usually required for L-1 applications.
- **H-1B Visa** (capped at 65,000 visas per year): Applicants must have professional level qualifications (bachelor’s degree and experience) for a professional level position in the U.S. State licensure, if required to practice in that field, is also necessary. Applying for and receiving labour certification from the U.S. Department of Labor is also required for the H-1B visa. H-1B visa holders can only work for the company that submits the application, meaning that the visa holder cannot work for another U.S. employer.³⁶
 - **(H-1B1):** The H-1B1 programmes provides for the temporary employment of non-residents in specialty occupations in the U.S. for a period of 1 year, limited to 5,400 nationals of Singapore (and Chile). Extensions may be obtained twice, but only in one-year increments. Further extensions can be obtained only with the filing of a new Labour Condition Application. The H-1B1 programme is governed by many of the rules that apply to the H-1B programme.³⁷

To apply for a visa to the U.S., you will need to employ the services of an immigration attorney that can help you with the USCIS filing/application process (please refer to page 66 in the Glossary for a list of attorneys).

³⁵ Source: http://www.esta.us/visa_waiver_countries.html

³⁶ Source: https://www.gdblaw.com/siteFiles/526cbb41-0cb6-4284-9aac-c9feb26de48c/custom/files/BusinessUSA_Eng.pdf

³⁷ Source: <https://www.dol.gov/whd/immigration/h1b1.htm>

c) Hiring locals (U.S. persons)

It is a common practice for Singapore companies to hire locally-recruited staff for positions requiring local knowledge of the U.S. operating environment (i.e. Operations Managers, Sales Executives, etc.) and/or for rank and file positions that can be filled with little training.

Important considerations:

- (i) The federal minimum wage is USD7.25 (SGD9.79) per hour for covered non-exempt employees; this is the minimum hourly pay for many workers. However, if you are running a food services establishment and have tipped employees, then you may have a different wage. ³⁸
- (ii) Many states and cities also have minimum wage laws (see figure below). Where federal and state laws have different minimum wage rates, the higher wage applies.

Minimum wage laws by state (2018), USD per hour³⁹

- New York: USD10.75 (SGD14.51)
 - ❖ New York City: USD12 (SGD16.20)
- California: USD11.00 (SGD14.85)
 - ❖ San Francisco: USD14 (SGD18.90)
- Texas: USD7.25 (SGD9.79)
- Florida: USD8.25 (SGD11.14)
- Illinois: USD8.25 (SGD11.14)
 - ❖ Chicago: USD11 (SGD14.85)

3.5 U.S. Labour Laws and Practices

a) Understanding the employment relationship in the U.S.

The employer and employee relationship can differ somewhat in the U.S. as compared to Singapore. For example, the Singapore Employment Act clearly sets out a minimum notice period depending on an employees' length of service. For the most part in the U.S., unless there is an employment contract with precise employment terms, the employee can be employed "at will" (elaborated upon below).

In the U.S., employees will not expect to have to sign a contract dictating a duration of employment.

U.S. employees can be quite mobile and the labour pool can stretch beyond the immediate city, state and/or region. There also tends to be a high level of competition for skilled & salaried employees, whereas low skilled/hourly employees are easier to hire, but also may require significant training and/or skilling-up.

b) "At Will" employment

"At Will" employment – a type of employment relationship in which there is no contractual agreement and either party may end the employment relationship at any time, for any reason or for no reason at all, without incurring a penalty.⁴⁰

U.S. laws for the most part do not grant employees the right of continued employment. Instead, employees are presumed to be employed "at will" (no commitment by either party on duration and or reason for termination), unless otherwise provided for in a contract between the employer and employee.⁴¹

c) Employment contracts and employee handbooks

³⁸ Source: <https://www.usa.gov/labor-laws>

³⁹ Source: <https://www.laborlawcenter.com/state-minimum-wage-rates/>

⁴⁰ Source: <https://dictionary.findlaw.com/definition/at-will-employment.html>

⁴¹ Source: www.ncsl.org/research/labor-and-employment/at-will-employment-overview.aspx

It is recommended to provide your employees with employment contracts, even though they may not be required by law, as these help document agreements and expectations about issues important to your business. A short agreement protecting the rights in confidential information and IP should be sufficient for rank and file, while a more comprehensive employment contract would be for senior/executive level positions.⁴²

In addition, it is also a typical practice in the U.S. to create an Employee Handbook that details the company's various policies and procedures (work hours, observed holidays, policies on harassment/discrimination, etc.), with which employees are required to comply as a condition of employment.

d) Labour unions

The National Labour Relations Act⁴³, also known as the Wagner Act, guarantees private sector employees the right to form labour unions in the U.S. The act also gives unionised employees the right to strike and to jointly bargain for working conditions.

Labour union – an organisation that represents the collective interests of workers. The labour union helps workers unite to negotiate with employers over wages, hours, benefits and other working conditions, and in return union workers pay a membership fee to the labour union.

Labour unions are often industry-specific and tend to be more common in manufacturing, mining, construction, transportation, and the public sector. However, they are also found in hospitality, restaurant, retail, grocery, processing, and packing (e.g. United Food and Commercial Workers International Union). While traditionally seen as beneficial to its members, labour union representation in the U.S. has declined significantly in the private sector over time.

3.6 U.S. Tax Laws and Requirements

a) Annual tax filing

In the U.S., a corporation is separate from its owners (shareholders) in terms of income taxes and hence, the corporation's owners do not pay the taxes for the corporation. Instead, a corporation pays income tax by filing a corporate tax return "Form 1120" and paying the taxes as indicated on the return. Corporate income taxes are paid at the corporate income tax rate, not the personal tax rate.⁴⁴

Form 1120 must be filed by the 15th day of the third month after the end of your corporation's tax year. If a corporation has a December 31st tax year-end, they would need to file the tax report by March 31st.

⁴² Source:

https://www.americanbar.org/newsletter/publications/law_trends_news_practice_area_e_newsletter_home/0705_litigation_employmentcontracts.html

⁴³ Source: Labor Union <https://www.investopedia.com/terms/l/labor-union.asp#ixzz5Qo6kuiHo>

⁴⁴ Source: <https://www.irs.gov/forms-pubs/about-form-1120>

b) State Income Tax vs. Federal Income Tax

It is important to understand the difference between State and Federal income taxes in order to avoid making mistakes that can cost you both time and money (such as underpaying or overpaying on your tax returns). The following is a description provided by the Internal Revenue Service (IRS):

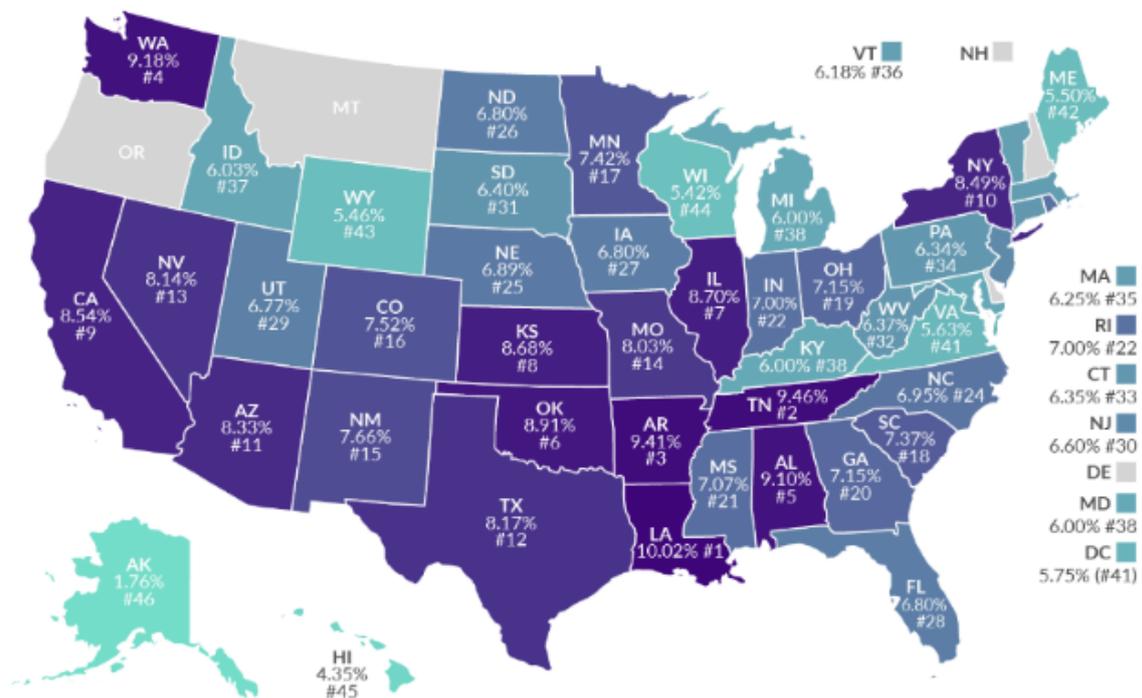
- **Federal Income Tax** is imposed on all citizens and residents of the U.S., regardless of the state in which you live. If you make your home (and/or business) in one of the fifty states, you are subject to income tax by the Federal government which is collected by the IRS.

The amount of Federal income tax that you owe each year is based on your income level. The U.S. uses a progressive tax system, which means that the more money you earn, the more taxes you must pay. How much you pay will depend on your marginal tax bracket.

- **State Income Taxes** are separate from the Federal tax laws enforced by the IRS. State taxes are levied by each individual state and vary depending on where you live, work, invest, etc. Some states choose not to impose income tax, including: Wyoming, Washington, Texas, South Dakota, Nevada, Florida, and Alaska. Tennessee and New Hampshire only impose tax on income from dividends and interest.

How High Are Sales Taxes in Your State?

Combined State & Average Local Sales Tax Rates, Jan. 1 2018



Note: City, county, and municipal rates vary. These rates are weighted by population to compute an average local tax rate. Three states levy mandatory, statewide, local add-on sales taxes at the state level: California (1.25%), Utah (1.25%), and Virginia (1%); we include these in their state sales tax. The sales taxes in Hawaii, New Mexico, North Dakota, and South Dakota have broad bases that include many services. This map does not include sales taxes in local resort areas in Montana. Salem County is not subject to the statewide sales tax rate and collects a local rate of 3.3125%. New Jersey's average local score is represented as a negative.

Source: Sales Tax Clearinghouse, Tax Foundation calculations, State Revenue Department websites



The nominal corporate tax rate in the U.S. is a flat 21% since January 2018 due to the passage of the “Tax Cuts and Jobs Act” in December 2017,⁴⁵ down from a maximum tax rate of 35%. Branch profits tax imposes an additional 30% tax on foreign corporations engaged in trade or business. Separate taxes are also levied at state and municipal levels.

City Income Tax – there are a few cities in the U.S. that levy a personal income tax, most notably New York City. New York City income tax is paid on your New York State income tax return with rates ranging from 2.9% to 3.6%.⁴⁶

Federal and state income taxes are due every year by April 15th. However, it is possible to file for an extension until October 15th if necessary.⁴⁷

c) Double taxation

Singapore does not have a double tax treaty with the U.S. It is thus important to speak to your tax lawyer or a tax expert about choosing a business structure that will shield you from potential double taxation, as well as how you plan to repatriate profits back to Singapore. This could influence whether the IRS may attempt to tax your Singaporean assets as well.

⁴⁵ Source: <https://taxfoundation.org/us-corporate-income-tax-more-competitive/>

⁴⁶ Source: <https://www.thebalance.com/new-york-city-income-tax-3193280>

⁴⁷ Source: <https://www.irs.com/articles/state-income-tax-vs-federal-income-tax>

4. Food Manufacturing (How to Approach the Market)

If you are exploring selling your products in the U.S. market, this section aims to guide you through the different approaches and provide an understanding of what can be expected when operating in the U.S. market.

4.1 Importing into the U.S.

The onus is on the importing company bringing products into the U.S. market to ensure that it meets the laws/requirements of the U.S. It is thus typical for Singapore companies to enlist the services of a licensed Customer Broker who can assist with:

- ❖ Ensuring your products can be lawfully imported (i.e. certain products/ingredients have strict import requirements for the U.S.)
- ❖ Ensuring your products meet the legal requirements for U.S. customs and import laws (administered by the Food and Drug Administration, Environmental Protection Agency, Department of Transportation, Consumer Product Safety Commission, Federal Trade Commission, Department of Agriculture, etc.), and that you have the proper documentation, product labelling, quality control, etc.
- ❖ Obtaining all the required licenses and permits to import your products into the U.S. (ideally a firm that participates in the Automated Broker Interface – ABI).⁴⁸

For a listing of licensed customs brokers you can visit:

- **CBP** (U.S. Customs and Border Protection) broker search tool – <https://www.cbp.gov/contact/find-broker-by-port>
- **NCBFAA** (National Customer Brokers & Forwarders Association of America) “membership directory” – <https://www.ncbfaa.org>

4.2 Food & Drug Administration (FDA) Approvals

Food companies that are planning to export the products to the US will need to ensure that they comply with Food & Drug Administration (FDA) requirements and guidelines. This information is readily available online at www.fda.gov. However, you may wish to engage the services of an FDA compliance firm that can assist you with the compliance processes (Food Facility Registration, Labelling & Ingredient Review, Food Canning Establishment, and Food Safety Plans & Programme).

The estimated compliance process will vary depending on a case-by-case basis, but you should plan to begin this process at least 3–6 months prior to when you plan to ship your products to the U.S. market. Also, fees tend to be itemised on a per item basis.

FDA compliance firms with an office in Singapore:

- **Registrar Corp** – www.registrarcorp.com
- **FDA imports** – www.fdaimports.com

It is important to note that FDA registration is required for all overseas facilities that manufacture, process, pack or store food, beverages, or dietary supplements that may be consumed in the U.S.⁴⁹

⁴⁸ Source: <https://www.cbp.gov/documents/publications/importing-united-states>

⁴⁹ Source: <https://www.registrarcorp.com/fda-food/>

4.3 Manufacturing in the U.S.

While most Singapore companies typically export their products into the U.S., further down the line some companies may decide that they would like to set up a local manufacturing facility in order to circumvent certain FDA requirements (i.e. animal-based products), eliminate tariffs, achieve cost efficiencies, etc.

In the event that your company reaches this important crossroad, you would need to consider the following:

- ❖ Where to locate your facility focusing on which region/state and/or city, taking into account possible state and local incentives or grants available to companies that meet a minimum threshold (i.e. capital investment and/or jobs created)
- ❖ How you plan to finance your new facility and if you intend to build a new facility and/or acquire an existing facility
- ❖ How you will staff your facility and whether you intend to hire locally/train and/or bring in your own staff
- ❖ Where to source your ingredients, machinery, and packaging from

If in the end you find that it is not financially viable to set up and operate your own plant in the U.S., another option is to outsource to a third party manufacturer that can manufacture on your behalf, although this option would certainly cut into your operating margin and thus increase your overall production cost.

4.4 Distribution (Warehousing/Cold Storage)

Depending on which point of entry your products enter the U.S. market, you may need to secure a third party facility (such as a warehouse or cold storage) to hold your products before they reach their final destination. It is possible to have your products shipped directly to your distributor. However, if you intend to store your products separately, you might want to enlist the services of a third-party logistics, freight forwarder and/or warehousing facility. Below are some helpful resources:

- **Leonard's Guide** (industry marketplace for transportation & warehouse services) – www.leonardsguide.com
- **Log-hub** (online marketplace that matches space and goods) – www.log-hub.com
- **Flexe** (warehouse space and services marketplace) – www.flexe.com

4.5 Approaches for Selling to the U.S. Market:

Once you have done the necessary market research, made the decision to sell your products in the U.S., properly verified that your products can be imported and that they comply with U.S. customs and import laws, the next step is deciding which channels you intend to target in order to reach your end customers. These could be supermarkets, ethnic markets/grocery stores, online and/or other establishments such as food service companies. For example, some sauce companies have found success entering overseas markets by selling their products directly to restaurants.

Different subsectors may also benefit from different targeted approaches. In order to make such a decision, you will likely need to employ a third party (partner) that can assist your company in gaining a foothold in the US. The following is a description of the different partners you can employ and how they might be able to help you achieve your goals:

- **Distributor** – a food distributor is an intermediary between your company and another entity in the distribution or supply chain, such as wholesaler, retailer, or food service establishment. Food distributors typically purchase products from your company and then store, transport, and sell them to third parties. However, while many may excel in the logistics & distribution, they may lack a strong focus on generating new sales.⁵⁰

⁵⁰ Source: <https://smallbusiness.chron.com/differences-between-wholesalers-distributors-retailers-30836.html>

Since a distributor will buy and hold your inventory, they will be looking for brands with demonstrated success (so if you are new to the U.S. market, you may try to focus on any sales you have generated out of Singapore) and complement their existing product offerings. They also typically require some sort of exclusivity agreement. However, you can negotiate this on a regional basis (city, state or region). Distributors may also require you to invest in store advertising and product demos as a way to build up product demand.

- **Broker** – a food broker is an independent sales agent who can provide you with access to their network of retail channels and help you generate sales. Food brokers work for both producers and buyers of food as they help to negotiate sales of products to chain/independent wholesalers, retail stores, and more.

One downside to food brokers is that they can be selective in choosing which brands/products they represent, since they will be working independently to general sales, and then will charge you both a commission and a retainer fee.⁵¹

- **Sales Rep** – someone who is employed directly by you (Singapore company employee) and acts for the benefit of your company only. The sales rep is responsible for selling your products to your target customers or third-party wholesalers. In the U.S., sales reps are typically paid a base salary (depending on experience/track record), plus a commission or incentives based on achieving certain sales targets.⁵²

- **Sales Agent**; is typically self-employed, works independently, and often has multiple clients. A sales agent typically earns a commission based on sales and works directly with a buyer to negotiate the best possible deal for your company.

4.6 Securing/Identifying your U.S. Partner(s)

Finding the right U.S. partner (be it a distributor, broker, sales rep or sales agent) is not always as straightforward a task as one might hope for and typically involves relying on recommendations, word of mouth, online research, and participation in conferences and tradeshows where you will have the opportunity to engage with potential distributors and importers in attendance.

Working with a Broker vs. Distributor:

	Broker	Distributor
Channels of Distribution	5%-10% Commission on Net Invoiced Price	18%-35% Margin on Wholesale Price
Commission Rate or Margin	Higher commission for pioneering and limited time devoted to selling new line	New lines with no customers may require terms such as Guaranteed Sales and 35% margin
Established Line or Pioneering	Works in existing channels; unlikely to pioneer new channels for untested products	Uses existing channels to move product; may take on new line to develop new channel of distribution

⁵¹ Source: <https://www.foodbrokers.org>

⁵² Source: <https://www.salesforcerearch.com/blog/httpwww-salesforcerearch-combid185259the-difference-between-hiring-a-sales-rep-vs-a-sales-agent/>

Product Plan	Interested in long-term product plan or roadmap	View current product from an investment perspective; will not commit to stocking additional items
Retail Programme	Will develop programs for the product but vendor is responsible for the programme	Will look to bundling new product into existing programs; vendor and distributor will often share programme costs
Delivery	Looks to ensure that vendor has product delivery requirements under control	Vendor looks to ensure that distributor has product delivery requirements under control
Invoicing and Administration	Vendor responsible unless otherwise negotiated	Retail terms of sale and receivables are distributor Responsibility
Product Returns	Vendor responsible for disposition of returns and issuing credits	Distributor handles returns and issues credit to store which are deducted from vendor invoice
Inventory	Vendor carries all inventory	Distributor stocks inventory on an as-needed basis or set monthly sales. Distributor will typically carry between 5,000 and 100,000 SKUs.

A typical practice is to secure a booth at one of the leading tradeshow with the hopes that a distributor or importer may approach your booth to learn more about your products. Another option is to do online research and identify a list of distributors, then email and call them to see if they would be interested in carrying your products.

Tip for cold-emailing distributors – research the company (and consider calling their general hotline to get more details) to make sure you have a name of a person you can reference in your email, since generically addressed emails will likely go unanswered.

It is also important to think about how many partners you would like to have for the U.S. market, since the market is large and has numerous regions. Should you decide to have more than one (which is quite common), then you may choose to split the market by East Coast and West Coast, which is a common practice employed by both Singapore and U.S. companies. In doing so, you would then need to negotiate exclusivity and/or non-exclusivity agreements with your partners.

Once you have identified your potential partner(s), you should:

- Employ a lawyer and/or assign someone on your team to do some due diligence to determine their legal status, track record and banking/financial history.
- Draft a contract or agreement for signing with your proposed partner(s). You can use standard online templates which you can modify, and/or ask your lawyer to help draft one for you.
- Ensure your U.S. partner (e.g. distributor) carries and maintains an acceptable level of product liability insurance covering the goods you sell to that partner. You may also choose to acquire your own product liability insurance to ensure an extra level of protection.

A listing of U.S. food distributors and ethnic food distributors can be found on pages 80 and 87 onwards of the Glossary.

Singaporean food manufacturing companies that have found success in the region shared that participation in tradeshow is critical for foreign food brands entering the U.S. market as a platform for distributors to discover their brands and products.

Leading U.S. Food Product Tradeshows & Conferences:

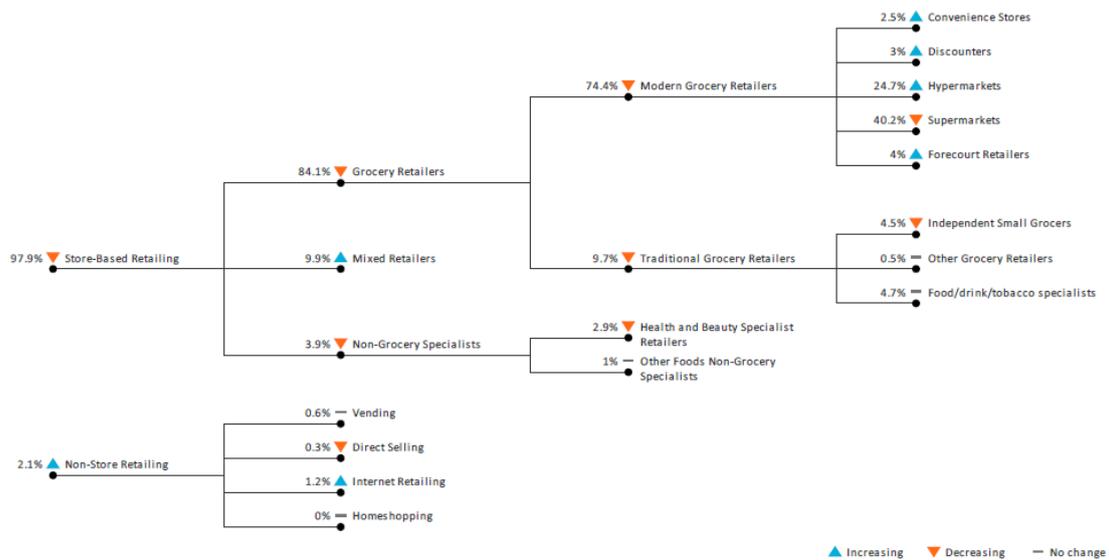
	Name	Location	Dates	Category focus
1	Winter Fancy Food Show	San Francisco	January	Specialty Food
2	International Production and Processing Expo	Atlanta, Georgia	February	Poultry, Feed, and Meat technology exposition
3	Annual Meat Conference	Dallas	March	Meat and poultry products
4	New England Food Show	Boston	March	Foodservice
5	International Restaurant & Foodservice Show of New York	New York	March	Food Services, Health Food, Coffee Fest
6	Vinexpo New York	New York	March	International wine and spirits
7	Natural Products Expo West	Anaheim	March	Natural Products
8	Seafood Expo North America	Boston	March	Seafood Suppliers and the whole supply chain
9	Snaxpo	Orlando	March	Snack Food
10	Bellavita Expo	Chicago	May	Italian food and wine
11	Sweets & Snacks	Chicago	May	Candy and snack
12	Summer Fancy Food Show	New York	July	Specialty Food
13	Western Foodservice and Hospitality Expo	Los Angeles	August	Food Service, Health Food, Coffee Fest
14	Natural Products Expo East	Baltimore	September	Natural Products
15	BioFach America	Baltimore	September	International Organic Products
16	Americas Food and Beverage Show	Miami	October	Food suppliers and Food Service
17	The NACS Show	Las Vegas	October	Convenience Store
18	PMA Fresh Summit	Orlando	October	Consumers, Floral, Food Safety, Foodservice
19	Private Label Trade Show	Chicago	November	Store brands

Based on past participation, the Summer and Winter Fancy Food Shows and Natural Products Expo (both East and West) have been the shows with the greatest interest from Singapore companies.

4.7 Channels

U.S. consumers continue in large part to purchase food and beverage products through traditional channels such as hypermarkets, supermarkets, grocery stores, and convenience stores. However, online/e-commerce is growing and is expected to reach 20% market share by 2025. Deciding which channels to target will need to form part of your strategy. Ethnic stores typically are the initial/primary channel of choice for Singapore companies.

Channel Distribution for Packaged Food
% Breakdown 2017 and Point Growth Trend - 2012-2017



Source: Euromonitor 2017 USA Country Report

4.7.1 Approaching Multi-Ethnic Stores

An obvious “traditional” channel for most Singapore companies looking to sell their products in the U.S. is to approach ethnic markets/stores (Chinese, Asian, Indian, multi-ethnic, etc.) as a first point of entry into the U.S. market. This is because these stores cater to customers seeking Asian products, which is typically the case for more traditional Singaporean food products. However, even mainstream Singaporean FMCG products can consider targeting this channel as a way to gain initial market share.

Some interesting facts from a study by LoyaltyOne on U.S. ethnic shopping habits⁵³:

- 59% of ethnic American consumers go to three or more grocery stores regularly in order to find the full product selection they are looking for.
- 61% of ethnic consumers are not finding enough ethnic food/ingredients at their main grocery store.
- More than half of consumers are going elsewhere to purchase ethnic food and ingredients: 33% of ethnic consumers go to a local independent market/grocer, while 44% go to a specialty food store.
- 86% of ethnic consumers say that a grocery store that offers ethnic food/ingredients is considered when choosing where they shop.

⁵³ Source: <https://www.supermarketnews.com/print/66284>

Leading Ethnic Retail Stores in the U.S.:

	Name	Description	Category	Market Coverage
1	H Mart	Korean and Asian supermarket chain supplying imported fresh produce, seafood, groceries and specialty items	Asian Grocery Store	Nationwide
2	99 Ranch Market	Large Taiwanese American supermarket chain carrying imported and domestic Chinese products	Asian Grocery Store	West Coast, Texas, New Jersey
3	Kam Man Foods	Leading Asian supermarket chain with stores located in New York, New Jersey and Massachusetts.	Asian Food Discount Market	Northeast
4	Good Fortune Supermarket	Large Asian supermarket carrying fresh produce, seafood and groceries.	Asian Grocery Store	East Coast, Texas and California
5	Patel Brothers	Leading Indian supermarket chain offering fresh produce and imported specialty items	Indian Grocery Store	Nationwide
6	Great Wall Supermarket	Leading Asian supermarket chain	Asian Grocery Store	New York
7	Kam Man Foods	First and largest Asian supermarket in the Tri-State region	Asian Grocery Store	New York, New Jersey and Connecticut
8	Asia Market Corporation	Ethnic grocery store and wholesale distributor providing hard-to-find East Asian and Southeast Asian products	Asian Grocery Store	New York

4.7.2 Approaching Supermarket Chains

If your product does not fall under the ethnic category and/or your plan is to target mainstream supermarket chains and big-box retailers (e.g. Walmart), you should be aware that this market is very competitive and margins are low. You will also need to be willing to invest heavily in marketing and will need to get retailers to agree to provide you with shelf space (which can include an additional slotting fee).

Apart from working with your U.S. distributor, broker, or agent to target this channel, many large U.S. supermarket chains often have online portals (e.g. Trader Joes) where suppliers can create profiles and list their products. Given the large volume of inquiries however, your chances of getting a response from one of their buyers will likely be limited.

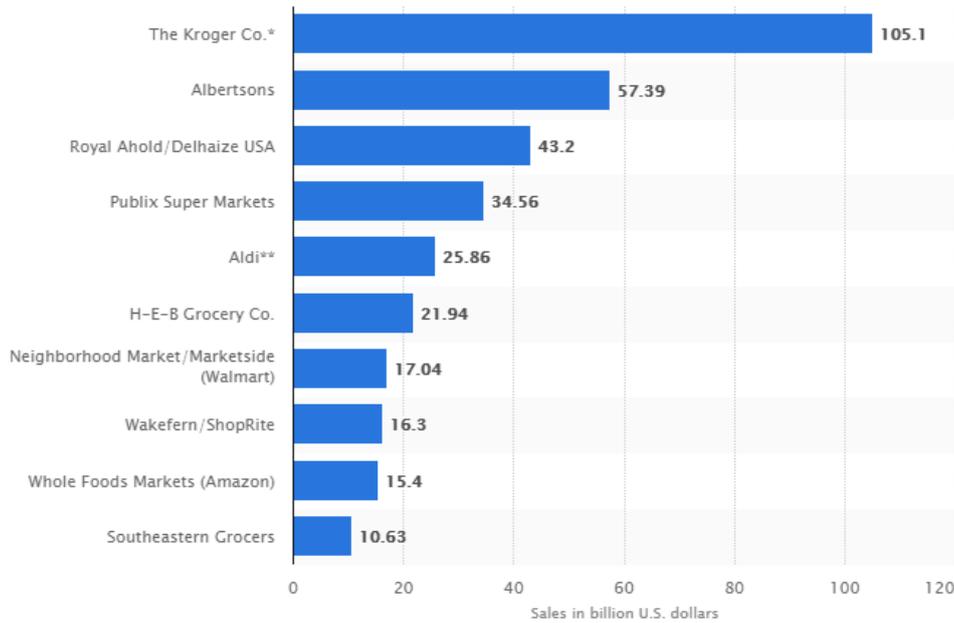
Leading Supermarket Chains in the U.S. in terms of 2018 Projected Sales:

Rank	Company, Headquarters'	Location Units	2018 Projected Sales (USD)
1	Walmart Supercenters, BENTONVILLE, AR	3,552	160,429,500,000
2	The Kroger Co., CINCINNATI, OH	3,576	96,894,614,000
3	Costco Wholesale Corp., ISSAQUAH, WA	746	71,918,040,000
4	Albertsons LLC, BOISE, ID	2,323	59,700,000,000
5	Ahold-Delhaize, QUINCY, MA	2,063	42,946,000,000
6	Safeway Inc., PLEASANTON, CA	1,269	37,000,000,000
7	Sam's Club, BENTONVILLE, AR	660	35,233,360,000
8	Publix Super Markets Inc., LAKELAND, FL	1,167	33,999,921,000
9	H-E-B, SAN ANTONIO, TX	378	21,100,700,000
10	Whole Foods Market Inc., AUSTIN, TX	465	16,030,000,000
11	Trader Joe's Co., MONROVIA, CA	474	12,860,000,000
12	Walmart Neighbourhood Market, BENTONVILLE, AR	701	11,649,000,000
13	Southeastern Grocers, JACKSONVILLE, FL	734	10,975,801,000
14	Meijer Inc., GRAND RAPIDS, MI	235	10,467,600,000
15	Aldi Inc., BATAVIA, IL	1,752	9,512,000,000
16	BJ's Wholesale Club Inc., WESTBOROUGH, MA	215	9,262,500,000
17	Giant Eagle, PITTSBURGH, PA	434	9,180,528,000
18	Hy-Vee Inc., WEST DES MOINES, IA	266	9,121,800,000
19	Wegmans Food Markets Inc., ROCHESTER, NY	95	8,490,000,000
20	Winn-Dixie Stores Inc., JACKSONVILLE, FL	518	7,340,000,000
21	WinCo Foods LLC, BOISE, ID	119	6,980,400,000
22	SuperTarget, MINNEAPOLIS, MN	251	5,600,640,000
23	Harris Teeter Inc., MATTHEWS, NC	245	5,420,000,000
24	DeMoulas Supermarkets Inc., TEWKSBURY, MA	79	4,740,000,000
25	The Save Mart Companies, MODESTO, CA	207	4,620,240,000

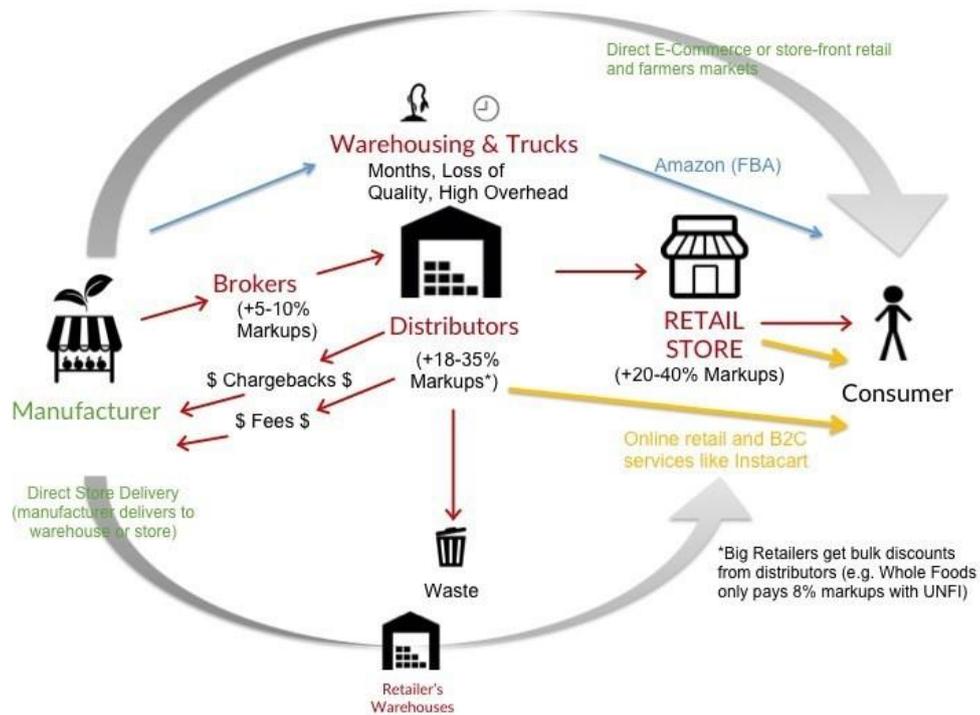
Source: [Chain Store Guide](#)

Leading supermarket chains in the U.S. (2017), based on Retail Sales (in billions of U.S. dollars):⁵⁴

⁵⁴ Source: <https://www.statista.com/statistics/197899/2010-sales-of-supermarket-chains-in-the-us/>



When pricing your products for the U.S. market, take into account the mark-ups from distributors (18 – 35%), brokers (5 – 10% + retainer), and retail stores (20 – 40%)⁵⁵:



Slotting fees

Many large supermarket chains, big box stores, and convenience stores are likely to require a slotting fee for product placement (which can average USD5,000 to USD350,000 (SGD6,750 to SGD472,500)⁵⁶ depending on the category and shelf placement). However, certain product types can be exempt from paying, including what are typically considered specialty items or items with a short shelf life (i.e. dairy, meats).

⁵⁵ Source: <https://medium.com/@podfoodsco/how-to-price-your-product-for-distribution-2e5a6ee8bc41>

⁵⁶ Source: "The hidden war over grocery shelf space" Vox (Nov 2016)

Retailers can ultimately choose which suppliers pay a slotting fee. Nevertheless, a non-exhaustive list of manufacturers who can typically expect to be charged slotting fees includes manufacturers of breakfast cereal, frozen food, canned/pickled/dried fruits & vegetables, baked goods, snack foods, coffee & tea, flavouring syrups & concentrates, seasonings & dressings, and beverages.⁵⁷

4.7.3 Online Channels for Selling in the U.S.

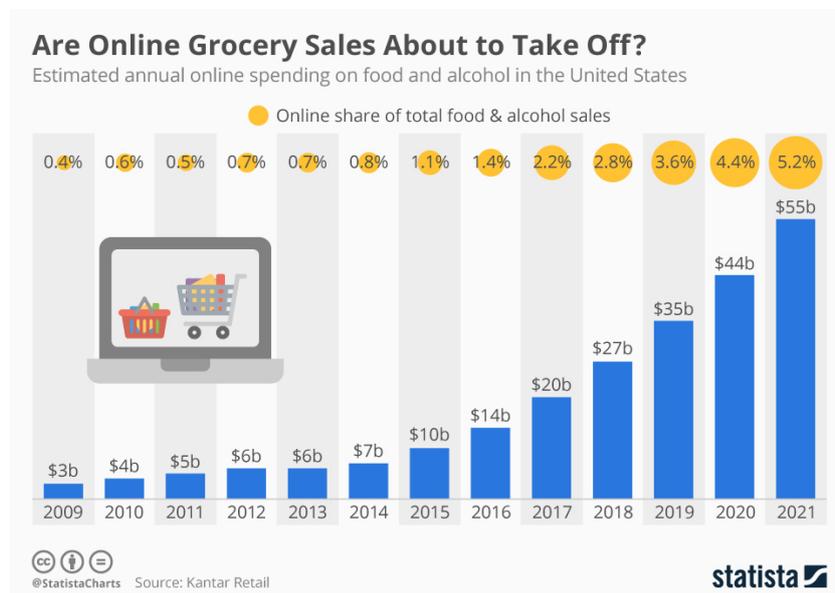
The average American now spends more time at work and less time at home, and as a result they have less time to dedicate to shopping for groceries and cooking. At the same time, the American food shopper is seeking out food that is fresh, minimally processed, and satisfies an increasingly adventurous palate (e.g. ethnic flavours).

E-commerce has stepped in to serve this gap and has provided a new way for customers to shop for food products. It has seen tremendous growth over the past decade, giving food companies the opportunity to provide value with services and products that save consumers time, both in food shopping and preparation.

To provide some perspective, U.S. online grocery sales amounted to USD14.2 billion (SGD19.2 billion) in 2017. This figure is expected to rise to USD30 billion (SGD40.5 billion) by 2021.⁵⁸

According to research released in 2017 by FMI and Nielsen, just 23 percent of U.S. households were buying food and beverages online, although interest is projected to climb steadily with 72% of respondents expecting to buy groceries online in the future.⁵⁹

If you are planning to sell your products online in the U.S., do take note that the U.S. government now requires online sellers with an “economic nexus” in a particular state to comply with that state’s sales tax requirements (previously covered in Getting Started; Paying U.S. Corporate and Income Taxes, page 29).



Online grocery sales are predicted to capture 20% of total U.S. grocery retail by 2025 and to reach USD100 billion (SGD135 billion) in consumer sales. It represents the next major retail sector to be disrupted by ecommerce.⁶⁰

⁵⁷ Source: NAICS Industry codes from 2003 Annual Survey of Manufactures

⁵⁸ Source: <https://www.statista.com/topics/1915/us-consumers-online-grocery-shopping/>

⁵⁹ Source: <https://www.consumerreports.org/grocery-stores-supermarkets/faster-fresher-cheaper-grocery-shopping-revolution/>

⁶⁰ Source: Study by the Food Marketing Institute conducted by Nielsen

Top US online grocery channels/marketplaces:

	Name	Description
1	Amazon Fresh (merged with Amazon Prime)	Amazon Fresh, a subsidiary of Amazon.com, is an online grocery delivery service available across key cities in the U.S., as well as London, Tokyo and Berlin. Amazon Fresh has recently merged with Amazon Prime, signalling that Amazon's acquisition of Whole Foods is changing the model as they deliver straight from stores. Amazon Prime charges a USD180 per year membership offering free delivery with a USD50 minimum.
2	Thrive	Thrive Market is an e-commerce membership-based retailer offering natural and organic food products at reduced costs.
3	Instacart	Instacart operates a same day-grocery delivery service, whereby customers select groceries through a web app from various retailers and the order is delivered by a personal shopper. Instacart charges USD5.99 for two-hour delivery, USD7.99 for one-hour delivery or free on orders of USD35 or more with annual fee of USD149.
4	Walmart Grocery	Walmart Grocery is Walmart's online grocery store service providing same day store pickup and delivery. Walmart charges USD9.95 per delivery with a USD30 minimum.
6	Target Grocery	Target Grocery is Target's online grocery store service providing same day store pickup and delivery option. Target charges a USD99 per year membership offering free delivery for orders with a USD35 minimum.
7	Kroger Delivery	Kroger Delivery is Kroger's online grocery delivery service that is powered by Instacart.
8	Fresh Direct	FreshDirect is online grocery delivery service that delivers food directly from suppliers. Fees range from USD5.99 to USD7.99 on orders of at least USD30.
9	Peapod	Peapod is an online grocery delivery service that delivers food direct from suppliers as well. It has a USD60 minimum and charges USD6.95 for order over USD100 or USD9.95 for orders below USD100.
10	Costco Same Day	Costco Same Day is Costco's online grocery delivery service that is powered by Instacart.

5. Food Services (How to Approach the Market)

If you are exploring opening a food services establishment in the U.S., this section aims to guide you through the different approaches and provide you with an understanding of what can be expected when operating in the U.S. market.

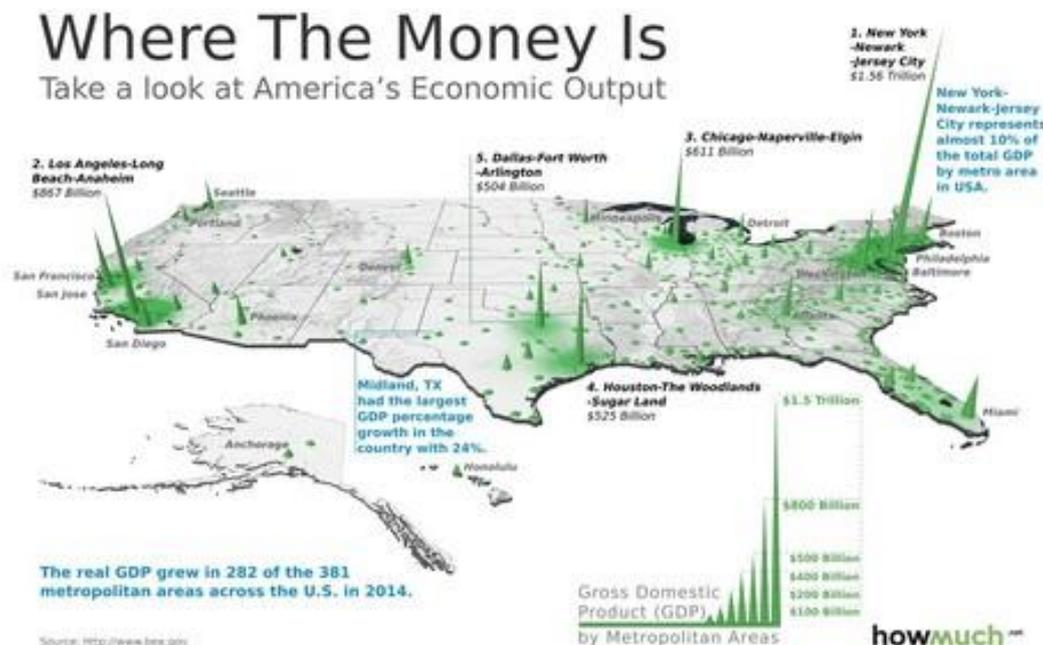
However, it is important to note that the restaurant sector in the U.S. is not without its challenges and that market saturation in certain regional markets is increasingly becoming an issue. No other sector has accounted for as much unit growth as restaurants in the post-recession era (after the 2007-2008 financial crisis); planned expansion from the major chains alone has averaged over 12,400 units annually since 2011, a figure that only represents about half of the marketplace.⁶¹

Other challenges include the rise of “grocerants” – retail chains as diverse as supermarket chains (e.g. Whole Foods), convenience stores (e.g. 7-Eleven) and pharmacy chains (e.g. CVS) – that have gradually been adding more prepared food options in their stores. Also, increased operational costs (from rent to wages) are making it more challenging for restaurant operators across the U.S., especially for low barrier-to-entry franchise operators who are facing competition from new and innovative concepts.

5.1 Choosing Market Entry Location

As a food services brand, choosing the first port of entry in the U.S. is perhaps the most important decision you will need to make. It is thus important to have clear objectives and parameters (e.g. an urban versus a suburban location) for why you are choosing to set up in a specific market.

Typically, Singapore companies will choose to open in one of the key gateway cities such as New York, Los Angeles or San Francisco. This is expected since these cities are world-renowned cosmopolitan cities with large Asian populations and provide a certain “brand cachet” which carry a level of prestige.



That said, key gateway cities are also some of the most competitive and expensive markets in the U.S. Through proper market research and groundwork, you may uncover other markets in the U.S. which you could also consider entering—from both an opportunity and cost perspective, and future growth and scalability prospects.

⁶¹ Source: Cushman Wakefield Market Beat - U.S. Shopping Center Q1 2017

Choosing between Urban (Central Business District) and Suburban (Shopping Malls)

The food services category you focus on (e.g. fine dining, casual dining, fast casual, quick service) may impact the area you wish to target (e.g. urban or suburban) after considering rent, operating cost, footfall and accessibility. Bear in mind that dining habits can differ from those in Singapore and/or Asia, especially due to the abundance of fast food and quick-service restaurants in the U.S. (particularly in the suburbs). For a comparison, urban retail rates typically have a considerable premium over suburban retail rates, although this can vary by city.

Typical annual rental rates per square foot (based on 2,000 sq. ft.)⁶²:

	City	Urban/CBD/Prime Shopping Area ⁶³	Suburban/Shopping Mall ⁶⁴
1	New York	Manhattan: USD640 (SGD864)	USD26 (SGD35)
2	Los Angeles	Beverly Hills: USD875 (SGD1,181)	USD33 (SGD45)
3	San Francisco	Union Square: USD700 (SGD945)	USD28 (SGD38)
4	Chicago	Magnificent Mile: USD550 (SGD743)	USD18 (SGD24)
5	Houston	Galleria: USD30 (SGD41)	USD22 (SGD30)

If you are considering opening in the suburbs (outside of the urban city centre), here are some useful tips⁶⁵:

- ❖ Pick a location that is accessible to public transportation, a highway, or a main road
- ❖ Typically, a suburban population will be more budget-conscious and family oriented, so cater to them by offering budget or family menu options
- ❖ A location near a suburban office park will help you draw a lunch crowd
- ❖ You may also choose a location in or near a shopping mall, but make sure you do your research as shopping malls have seen a decline in visitors across the U.S.
- ❖ Research the demographics about the suburbs so you can identify which area you would like to target (e.g. prosperous areas with a higher spending power)
- ❖ Suburban consumers are seeking out new, more “adventurous” dining options, so do not feel that you must adapt your menu offering

5.2 Operating Model

Depending on where you choose to set up in the U.S., your operating costs could fluctuate depending on the prevailing leasing rates, labour costs and cost of goods. On average, cost of goods (COGS) can range from 25% to 40% depending on the category and quality/freshness of food, followed by labour at around 30% and rental at around 5% to 8% (or higher in key gateway cities). In addition to an overhead of 10%, this leaves a pre-tax margin of around 10%.

Average operating model for a U.S. mid-size restaurant:

COGS	Labour	Rental	Gross Margins	Overhead e.g. SG&A	Pre-tax margin
25% - 40%	30%	5% - 8% (10% in key gateway cities)	20%	10%	10%

5.3 Site Selection

Identifying the right location for your establishment will require a significant amount of research, knowledge of the local market, and access to leasing rates/opportunities. You would most likely want to employ a Real Estate Broker (or Consultant) to assist you with finding a suitable location for your establishment.

⁶² Source: <https://bizfluent.com/info-8721571-average-space-per-square-foot.html>

⁶³ Source: <http://www.chicagotribune.com/business/columnists/ori/ct-biz-mag-mile-rents-ryan-ori-20171114-story.html>

⁶⁴ Source: Cushman Wakefield Q1 2017 Commercial Shopping Center report

⁶⁵ Source: <http://openforbusiness.opentable.com/features/how-to-open-a-restaurant/city-limits-6-tips-for-opening-a-restaurant-in-the-suburbs/>

Q2 2018 U.S. RETAIL FIGURES - EXECUTIVE SUMMARY

RETAIL SALES POST HIGHEST GROWTH SINCE 2012; RENT GROWTH CONTINUES TO RISE

Availability Rate
6.5%

Net Absorption
4.5 MSF

Completions
7.0 MSF

Net Asking Rent
\$17.37 PSF

Arrows indicate change from previous quarter.

- Retail and food sales posted a 6% year-over-year gain in Q2—the biggest such increase since 2012.
- Asking rent growth continued to rise, despite concerns over vacancy.
- Although down from Q1, net absorption remained positive.
- Consumer sentiment remained historically high, despite a small decline from Q1.
- Store closures and e-commerce growth continued to negatively affect the lifestyle & mall segment.
- New supply remained limited, creating opportunities for redevelopment of existing properties.
- With the unemployment rate at its lowest level in many years, wages and spending are expected to post healthy growth for the remainder of 2018.

Source: CBRE Research⁶⁶

5.3.1 Working with a Real Estate Broker

A real estate broker can assist in the search for the right location, otherwise known as Site Selection Services, and would bring to bear on your behalf their knowledge of the market, research tools, and relationships with local landlords and real estate community as a whole. Sometimes referred to as a real estate consultant or advisor, a broker develops & implements real estate strategies in line with a company's business model.

Once you have identified your real estate broker, the next step is for them to provide you with a list of potential locations for you to consider, taking into account your criteria and preferences, and then arrange for you to visit the location of your choosing. The broker will also help you negotiate the lease terms (having an experienced broker will help you secure the most optimum terms), and would be paid a commission or fee by the landlord. Both Landlord and Tenant have their own respective advisor/consultant or representative.

The following are some tips on working with a broker and securing a site:

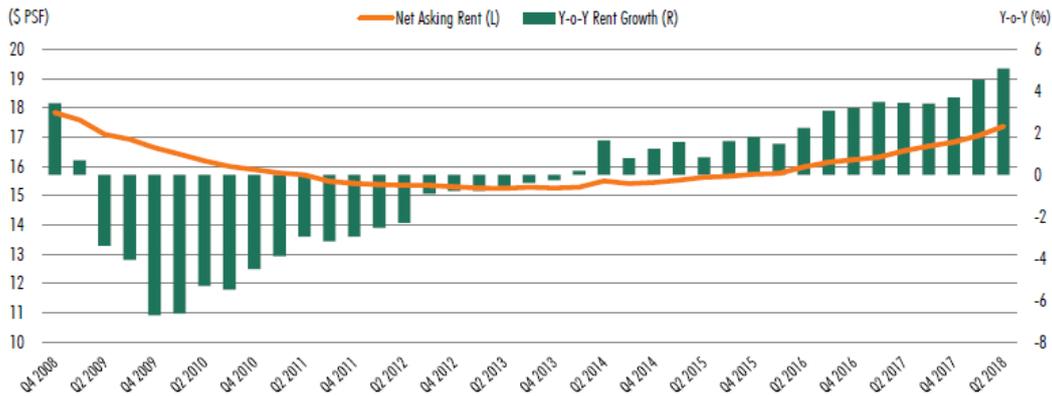
- ❖ Brokers/agents typically require an exclusive arrangement, so make sure you do your homework and find a broker that you feel comfortable with.
- ❖ Decide which permits and licenses you require prior to engaging a broker since some sites come with licenses (e.g. liquor) and can reduce the time and paperwork needed to get these licenses.
- ❖ Come prepared with a pitch deck or marketing pack so that you can share your plans with the potential landlord, since landlords can be selective.
- ❖ Prior to signing a lease, make sure you perform some due diligence on the property, such as confirming:
 - Area demographic statistical analysis and carrying out an in-person inspection;
 - What (if any) restrictions the landlord has imposed on the property;
 - Whether alterations are required to permit use, bring space to code compliant manner or use, Americans with Disabilities Act (ADA) standards and other conforming use(s);
 - If the conditions are suitable for the tenants' use.

⁶⁶ Source: CBRE Research (U.S. Retail – Q2 2018 Figures)

5.3.2 Typical Lease, Rental Structure and Cost Components:

- 1) **Rent payable** – The lease should contain the amount of Quoted Rent (per square foot) payable per year, which is commonly expressed as an amount per square foot. It is important to have your broker negotiate specific limited and sometimes capped increases in base rent year over year, typically based upon a formula that increases in the consumer price index or more customarily, per general market conditions. If not negotiated favourably, there may be significant spikes in rental costs year over year.

TOTAL RETAIL NET ASKING RENT CONTINUES TO RISE



Source: CBRE Econometric Advisors, Q2 2018.

- Total net asking rent growth continued to rise in Q2—up 5.1% year-over-year—and pushed the average net asking rent to a nine-year high.
- Average rents increased across all major property types except for lifestyle centers & malls, which experienced a year-over-year decline of 5%.

Source: CBRE Research⁶⁷

- 2) **Key Money** – In the case of sites with existing infrastructure such as built-in-furniture, kitchen appliances, electrical work, etc., the landlord might request a one-time payment that covers the extra facilities or additional payments over an agreed upon period of time.
- 3) **Concessions** – Sometimes landlords will offer you “free rent” while the store is undergoing construction/build-out work and/or your first months when sales might be slower and operations are ramping up. Free rent is beneficial to offset the start-up period.
- 4) **Fit-out Costs** – This refers to the additional costs funded primarily by the tenant for refitting a space to suit the operator’s requirements. Even though such costs are funded primarily by tenants, in some cases (and if negotiated properly,) landlords can mutually agree to participate in construction costs. A tenant’s credit and brand can play a major role in whether landlords will invest in construction costs towards accommodating tenants’ occupancy. Building Journal puts the national average cost for a 5,000-square-foot restaurant with mid-level finishes at USD160 (SGD216) per square foot (USD800,000 or SGD1.08 million in total), which would include the build-out, permits, equipment, and design. That cost is higher in cities such as New York (USD216 or SGD292 per square foot) where a 2,000 sq. ft. space for a 50-75 seat restaurant ranges from USD300-350 (SGD405-473) per square foot for the front of house and USD200 (SGD270) per square foot for the back of house.⁶⁸ The cost of infrastructure of back of the house equipment, e.g. kitchen equipment, exhaust, circulation and air returns, floor drains, increased capacity for power & water, HVAC equipment, etc. could also exceed the costs for front of house.
- 5) **Lease Term and Renewals** – Lease terms will vary depending on what you are able to negotiate with the landlord, but the length of the term will typically be 5, 7 or 10 years (and should include an early termination clause)⁶⁹. While not always the norm, high street locations

⁶⁷ Source: CBRE Research (U.S. Retail – Q2 2018 Figures)

⁶⁸ Source: <https://www.buildjournal.com>

⁶⁹ Source: <https://totalfood.com/commercial-lease-renewal-dos-donts-for-restaurant-tenants/>

tend to have shorter lease terms, while shopping malls and/or suburban locations tend to have longer lease terms.

You might also want to try to negotiate whether you will have the right to renew the lease at the same or fair market value after the expiration of the initial lease term. This is directly connected to size of space, length of lease term, level of capital invested in the space and other market conditions at time of renewal.

- 6) **Security Deposit** – A landlord will typically seek a security deposit (equal to 1 month’s rent) or letter of credit, and may also request personal guarantees of performance if you have limited assets or a limited business track record in the U.S. The requested security deposit is tied to creditworthiness, history, financial statements, P&L, and brand of a tenant or company.
- 7) **Broker Fees** – Real estate brokers are typically paid a commission by the landlord, although they may occasionally charge a success fee (pre-negotiated). It is important to note that the broker’s role is to get the lowest rent for the tenant, hence bringing tenant’s leasehold obligations within their economic budget parameters.
- 8) **Additional Start-up Taxes and Charges** – These will likely vary state to state, but can include items such as insurance, permits and licensing, accounting costs, and legal fees.

5.3.3 List of Licenses and Permits Required to Open a Food Service Establishment⁷⁰:

- 1) **Business License** – This is a state-issued license in order to operate a business legally in that state. In order to obtain one, you can visit the U.S. Small Business Administration (SBA)’s website for details at <https://www.sba.gov/business-guide/launch-your-business/pick-your-business-location>.
- 2) **Liquor License** – A liquor license is required if you plan to serve alcohol in your establishment. The rules for obtaining and keeping a liquor license vary by state, although in general it is difficult and prohibitively expensive to acquire. Unless liquor is part of your business model or product offering, you might instead opt for a wine & beer license, which is typically easier and more affordable to acquire.
- 3) **Food Service License** – This will vary by location and is issued by a city’s health department (online application form). It requires a visit from a health inspector to ensure that your restaurant is operating in accordance with restaurant food safety regulations.
- 4) **Employee Identification Number (EIN)** – This is the tax ID number that is assigned by the IRS.

5.4 Models for Entering the U.S.

When considering market entry into the US, key concerns for Singapore companies typically revolve around first understanding: 1) costs and investment required; 2) how much control the company plans to maintain over US operations; and 3) the types of local partners required to set up operations.

As such, there are different pros and cons for each type of market entry, ranging from setting up on your own (e.g. flagship location), a joint venture/partnership, and/or the franchise model.

5.4.1 Wholly-Owned Model

A common model for overseas brands entering the U.S. is to retain ownership of their brand by opening a wholly owned location in the city/state of their choosing, which helps to build brand awareness in the market. This first location also serves as a flagship location (proof-of-concept) for the U.S., and is particularly useful if you plan to later franchise your brand as franchisees in the U.S. often look to franchise brands that have successfully proven their business model/concept in the U.S.

⁷⁰ Source: <https://smallbusiness.chron.com/license-need-own-operate-restaurant-12938.html>

VeganBurg – Case Study in Successful U.S. Market Entry

In late 2015, Singaporean fast-casual chain VeganBurg announced plans to expand into the land of the hamburger, the U.S.A, their first expansion outside of their home base in Singapore.

VeganBurg is a family-owned restaurant chain with 100% plant-based menu that features popular comfort foods such as burgers and fries. “We chose the U.S. market because of our vision: to be the burger of the new generation. Not only that, the United States is leading the world in terms of trends, change, and revolution in the food industry. Those characteristics are key ingredients in making a strong business venture,” says CEO and brand founder Alex Tan.

Alex leads a mission to inspire and excite the world to choose a plant-based diet which is optimal for health and sustainable living. “We’re focusing on filling the gap from where the nation is now in terms of food choices—and VeganBurg is the bridge towards that”, he added. For their overseas debut, VeganBurg’s San Francisco store adapted their menu for the local market, featuring U.S. favourites such as classic all-American burgers.

VeganBurg tapped Enterprise Singapore’s network of real estate firms, legal contracts and government multipliers, as well as their insights and understanding of the U.S. market, particularly Los Angeles and San Francisco, before finally settling on San Francisco as their first location. Alex’s advice to Singapore foodservice brands preparing to enter U.S.: “While I can only share my own experience opening in San Francisco, it was extremely challenging in all aspects—including high labour costs, meeting local regulations, and even having to revamp most of our menu and recipes to adjust to local tastes. If you want to succeed in the U.S., you need to be truly committed and be prepared to slog it out over a long period time.”

The company’s success can be attributed to continuous hard work and perseverance, including self-financing their first U.S. outlet to prove that the concept can be successful for the U.S. market. VeganBurg is currently exploring opening more outlets in San Francisco, and is planning to franchise the brand—starting with California and then across the U.S.!

However, entering the market alone can be challenging because of high upfront investment costs, a lack of local operating experience, and consumers’ unfamiliarity with your brand/concept. On average, the capital outlay (including working capital) for fast casual/quick service is around USD1-2 million (SGD1.35-2.7 million), and at least USD2-3 million (SGD2.7-4.1 million) for a casual dining/fine dining restaurant.⁷¹

In order to overcome these initial hurdles, Singapore companies may choose to:

- 1) Enlist the services of a consulting firm (hospitality/food & beverage focused) that can help you navigate the market, provide you with guidance on set-up and permitting, and work with you to refine and adapt your concept/offering (menu, pricing and branding) to the local market. (*Refer to Glossary – page 67*)
- 2) Test the market through an event, pop-up, and/or food truck, in order to help you gauge consumer tastes and allow you to adapt menu offerings. This model is also less capital-intensive and can create opportunities to build brand awareness and connect you with a potential local partner. (*Refer to Glossary – page 69*)

As an example, a well-known New York-based authentic barbecue chain, Mighty Quinn’s, first started out by having a pop-up at a popular weekend food festival in Brooklyn called Smorgasburg. After receiving strong demand and building a local following, the founders of Mighty Quinn’s decision to expand by adding some food trucks, and from there were able to grow to 15 restaurants over a 7-year period, including 9 corporate-owned locations, a restaurant at Yankee Stadium and 5 international franchised units.⁷²

5.4.2 Joint Venture/Partnership Model

⁷¹ Source: <https://www.credibly.com/incredibly/evaluating-capital-needs/how-much-working-capital-does-your-restaurant-need/>

⁷² Source: No Limit Agency – Mighty Quinn’s Press Release July 2018

Another model to consider is forming a joint venture (JV) and/or partnership with a local U.S. company or operator. However, these opportunities tend to be harder to find and can also be challenging to manage, especially from halfway across the globe. A U.S. partner would also likely expect you to come up with a larger portion of the initial capital investment (e.g. 70%), as they would see themselves bringing the local operational expertise to the table, and would be less prone to taking on risk for the venture.

Potential partners can include:

- 1) **Private Equity (PE) firms** – invest in concepts (in return for equity) that are scalable and have a proven track record. However, PE firms typically want to have an active role in the running of the business.
- 2) **Food & Beverage operators** – typically view themselves as more of an operating partner rather than an investor, but might be willing to put in a minority investment (e.g. 30%).
- 3) **Hospitality companies** – typically view themselves as landlords, but might be willing to co-invest and/or explore other trade-offs (e.g. preferential lease terms) if they think that concept could help drive traffic to hotel property.

5.4.3 Franchising Model

Franchising is often the initial mode of entry that many Singaporean companies (notably in the fast casual and quick service segment) want to consider when first entering the market, given that it is relatively low-risk and requires less investment. However, it can be rather difficult to find franchisees who are willing to franchise your brand without having a demonstrable first location (e.g. flagship location) to serve as an operational benchmark and proof-of-concept for the U.S. market.

Similar to JV/partnerships, identifying a franchisee can be very opportunistic since franchisees tend to lack a specific profile. They can range from PE firms, restaurant groups and foodservice operators to individuals. Occasionally, Singapore foodservice brands are approached by Singaporeans who have relocated to the U.S. and are interested to start their own business, and believe said concept would be successful in the market. This, however, is equally opportunistic.

If you decide that franchising is the model you wish to pursue for your company, you can consider exhibiting at one of the key franchise shows (refer to Glossary page 79) and/or engage the services of a franchise consultant (refer to Glossary page 69) who can help you identify/recruit potential franchisees for your brand. It is important to note that franchising is heavily regulated in the U.S. at both the federal and state levels, so be prepared to engage franchise lawyers in each state where you plan to franchise.

Typical franchise fees/structure in US⁷³:

Franchise Fees (typical range)	Master Franchise (typical range)	Marketing Fees (typical range)	Royalty Fees
USD20,000-50,000 (SGD27,000-67,500)	USD100,000 (SGD135,000)	2% - 4% (goes into a joint fund to cover marketing & advertising for the brand)	4% - 12% (collected on a monthly basis)

5.5 Sourcing Ingredients

The U.S. has a well-developed ethnic grocery sector, making it easy to source ethnic products locally from wholesalers in the U.S. Food services operators typically source from multinational wholesalers such as US Foods, Sysco, Cheney Brothers (see full list in Glossary page 80) and U.S. Trading Company (for Asian products), and may even source directly from the producers.

If you are planning to import ingredients from Singapore or other countries in Asia, you should note that the FDA has strict import restrictions for products of animal origin (such as meat, eggs, milk or poultry) and may require permits, health certificates, and/or other specified certifications from the country of origin⁷⁴. However, as stated above, all these products can be easily sourced in the US.

⁷³ Source: <https://www.sba.gov/blogs/franchise-fees-why-do-you-pay-them-and-how-much-are-they>

⁷⁴ Source: https://help.cpb.gov/app/answers/detail/a_id/83/-/importing-food-for-commercial-use-%28resale%29

5.6 New Business Models

5.6.1 Shared Kitchens

Culinary incubators sit in an interesting space between commercial kitchens and incubator programmes, and are helping to bridge the gap between self-production and moving to a co-manufacturer. They often provide access to expensive kitchen equipment, business services, and mentorship, and in return may charge moderate fees for kitchen rentals and storage and/or request future equity in the company.

List of Shared Kitchens Operators:

Name	City/State	Description
LA Prep	Los Angeles, California	Provides full-time production space for wholesale food producers.
La Cocina	San Francisco, California	Incubator kitchen working to cultivate low-income food entrepreneurs by providing affordable kitchen space, industry-specific technical assistance and access to market opportunities.
KitchenTown	San Mateo, California	Food startup incubator that provides production space, equipment, and the opportunity to interact with a community of like-minded peers, industry experts, and investors in order to help entrepreneurs scale their businesses.
Union Kitchen	Washington D.C.	Kitchen incubator providing production space, distribution services, and mentorship.
PREP	Atlanta, Georgia	Half of their 15,000 SQF space is dedicated to food trucks; they also offer business acceleration services.
The Hatchery	Chicago, Illinois	Provides education, capital, and support to the Chicagoland food entrepreneur community.
CommonWealth Kitchen	Boston, Massachusetts	Commercial kitchen helping to grow established businesses by providing large volume production equipment, business assistance, marketing, and access to capital.
Foodworks Brooklyn	Brooklyn, New York	Culinary incubator / shared kitchen with locations in Brooklyn and Providence
Hot Bread Kitchen	New York City, New York	Kitchen incubator focused specifically on bakers.
Organic Food Incubator	New York City, New York	Provides kitchen space, contract manufacturing services, education and coaching to growing food and beverage companies.
Cook's Nook	Austin, Texas	The Cook's Nook is a culinary incubator providing shared production space and business development for Austin-area artisans, caterers, and cooks.

5.6.2 Cloud Kitchens

Cloud kitchens (or ghost kitchens) are facilities where restaurant operators can prepare meals for delivery only. There is no storefront branding and no front of the house, and the kitchens are often shared spaces.

Kitchen United, based in Pasadena, California, has launched a 12,000 square foot commercial kitchen space with room for as many as 12 different restaurant operators (including food trucks), and includes services such as laundry and dishwashing, available at hourly (starting at USD25 or SGD33.75 per hour), or monthly rates. The tech-enabled facility uses an integrated point-of-sale system, back-of-the-house automation and ordering efficiencies that are compatible with various delivery platforms in aggregate.⁷⁵

They are similar to catering or commissary kitchens, but this new breed is more than just a permitted place to cook. Cloud kitchen facilities are typically optimised for off-premise business, offering shared infrastructure and services, a design compatible with the comings and goings of drivers, as well as built-in relationships with third-party delivery specialists.

While cloud kitchens may not be an ideal model for market entry, it can be a useful tool to expand your catchment area once you have established your brand and are keen to grow sales through delivery.

5.6.3 Food Trucks

The Food truck trend in the U.S. has already peaked. However, it remains a popular alternative for food brands/operators looking to expand beyond brick & mortar and also provides the flexibility to cater to temporary events, especially in urban/suburban centres. These days, there are currently more than 4,000 food trucks operating in the U.S., with annual sales exceeding USD1.2 billion (SGD1.62 billion) according to IBISWorld.⁷⁶

5.6.4 Food Halls

A recent development across the U.S. is the growing trends toward foods halls, which are essentially upmarket food courts that feature a number of locally or internationally sourced food concepts. Food halls exclude mass market fast food chains typically found in food courts or shopping malls (e.g. Subway, Panda East, etc.).

Food halls are becoming a favourite among mall operators and real estate developers who see them as a part of an experiential retail strategy, and among consumers who are eating out more than ever and want authentic dishes to satisfy increasingly sophisticated palates. Typical food hall vendor space will average between 200 to 400 square feet, so many operators have other larger locations or use commissary kitchens to prepare food items that require larger kitchens.⁷⁷

In tracing the segment's recent growth, Cushman & Wakefield found the number of existing food hall projects increased 37% in the first nine months of 2016; by the end of 2016, the U.S. had a total of 35 new food hall projects totalling 771,000 square feet. By 2019, Cushman & Wakefield anticipates as many as 200 major projects throughout the U.S.

Food halls offer several advantages over standalone brick and mortar locations, most notably the low cost of entry. The overall build-out is much lower than a typical restaurant because of the smaller vendor space, while the shared dining area is taken care of by the food hall. Other communal features handled by the food hall include shared bathrooms and dining areas, janitorial services, umbrella marketing, maintenance, electricity, security, and in some cases, landscaping. This all comes at a

⁷⁵ Source: <https://www.restaurant-hospitality.com/print/33048>

⁷⁶ Source: <https://www.qsrmagazine.com/growth/12-mobile-food-trends-future>

⁷⁷ Source: NRF Magazine "Food halls are the next step in the evolution of food retail – STORES"

higher cost per square foot, but will typically mean overall savings for the operator when factoring in communal savings.

It is important to note that food hall operators tend to be quite selective in sourcing food vendors, since this fits in with their strategy of creating a unique experiential experience. Operators would typically require the food vendor to have an existing location which has proven to be successful and would be a draw for the food hall.

6. Building your Brand

As a new brand entering the U.S. market, you will need to invest in a concentrated marketing effort to push your brand across a range of platforms in order to reach your customers, especially if you are a B2C company. Strategies can involve everything from deciding on product placement, your pricing strategy, in-store promotions, where to advertise, and of course having a consistent social media presence.

Failure to adequately fund marketing or invest in branding is a common mistake that foreign companies typically make when planning to enter the U.S. market. The U.S. has a highly marketing-oriented business culture, so investments in marketing are key to standing out and differentiating your brand in a highly competitive and often saturated market.

It is important to note that the marketing dollar spend in the U.S. is higher than average and that there is a significant structural gap in the sheer size of marketing investment that foreign companies must bridge. For example, companies in the U.S. spend an aggregate USD230 billion (SGD310.5 billion) a year on advertising, representing 35% of global spend, or an average of USD600 (SGD810) per capita. By comparison, Germany's and Singapore's average per capita advertising spend is USD350 (SGD473) per year.⁷⁸

There are a few steps that Singapore companies can take to help them better formulate an action plan/strategy for the U.S. market⁷⁹:

- 1) **Research the market:** Research the U.S. market (and ideally your target market) and get the facts straight, especially demand forecasts, competition and operating environment.
- 2) **Consider adapting your products for the market:** While some products may be accepted universally, other products need to be tweaked to the tastes of the local U.S. consumer. One way to gauge this is to assess whether or not your products can stand “as is” among different groups of global consumers or whether they need to be adapted to appeal to local consumers (e.g. if it works in Australia then it will likely work in the U.S. as well).
- 3) **Develop a coherent U.S. marketing positioning:** Companies must always give customers a reason to try their products or services, and newcomers to an established market such as the U.S. must provide a better reason to switch brands.
- 4) **Ensure you have set up proper delivery channels:** Make sure you have proper warehousing, fulfilment and shipping channels in place before you launch your products, as U.S. consumers can be unforgiving about products that arrive late or are out of stock.
- 5) **Ensure your brand translates to the U.S. consumer:** A product name or slogan from Singapore/Asia may translate poorly in the U.S. Nuances such as colours, symbols and packaging can also shape positive or negative perceptions in the U.S.
- 6) **Check packaging requirements:** Since packaging needs differ around the world, part of your fact-checking should be to understand how the potential buyers of your products prefer products to be packaged (e.g. brands that want to convey healthy and natural ingredients should refrain from using shiny plastic packaging).
- 7) **Promote your product according to U.S. cultural norms:** Your tone and marketing message should be adapted so that it appeals to the cultural norms of U.S. consumers. Consider hiring an agency well-versed in international marketing to help you craft your message for the U.S. market.

⁷⁸ Source: <https://www.statista.com/statistics/238394/marketing-spending-in-the-us/>

⁷⁹ Source: http://www.ceintelligence.com/content_manager/contentPages/view/us-market-entry-strategies

6.1 Marketing/Social Media Tactics and Tools for the U.S. Market

Depending on your budget, marketing goals and resources, there are a number of different strategies or tactics that a company can deploy to reach your customers, be it supermarket chains and/or restaurant customers. Each of the following strategies is a tactic that can be used in combination or separately to achieve the same goals: build brand awareness, drive traffic to your website and increase sales.

1) Create awareness on a small budget

- Send newsletters to current and potential clients
- Send regular email updates to keep your customers informed
- Participate in speaking engagements to drive awareness for your brand
- Publish articles in journals
- Network. Networking is important in the U.S., especially through professional bodies, and allows you to make useful contacts and/or meet potential partners/customers
- Participate in/attend trade shows
- Organise roundtables, webinars, special events driven by commercial issues you share or understand to impact your target client base
- Distribute your corporate literature as widely as possible

2) Outsource to a third party/specialist

- Employ marketing agencies that can provide you with a comprehensive marketing/branding strategy and help you execute a marketing plan for the U.S., at least initially to get your first started or launched in the market.
- Develop relations with specialists (e.g. social media experts) which your business can employ on a project basis.

3) Invest in digital marketing

- Invest in low-budget digital marketing tools to look for and acquire consumers in the digital space.
- Use tools such Google Keyword Planner and Analytics to see where current traffic is coming from and what keywords will get you more of that traffic.
- Invest in Search Engine Optimisation (SEO) and optimising your online presence in order to build a strong digital footprint.

4) Leverage social media as a strategic tool

- Create a company Facebook page (and keep it updated)
- Create a U.S. LinkedIn page and profiles for the key officers in your organization
- Start a special interest group on LinkedIn to invite customers, prospects and others to join it for sharing your company's latest products/services, innovations and observations on the industry sector and trends
- Use Twitter to promote new products, services or to make announcements
- Start a company blog to deliver content and updates to your customers
- Grow the number of websites that link to your organisation's website and other websites about your products/services, press releases and latest developments
- Make sure you regularly manage rating sites such as Yelp, TripAdvisor and etc. Like it or not, these online ranking/rating sites have become mainstream and can have a negative impact on your business if not handled correctly.

6.2 Public Relations Agencies

Often overlooked due to the relatively high cost, public relations (PR) agencies serve an important role in helping consumer-facing brands reach their target audience. PR agencies' primary function is to promote companies or individuals via editorial coverage. This is known as "earned" or "free" media, such as stories appearing on websites, newspapers, magazines and TV programmes, as compared to "paid media" or advertisements.

PR agencies and advertising agencies typically share the same goals of promoting clients and making them seem as important, exciting or relevant as possible. However, the paths to creating awareness are different. Most people understand advertising is paid for by the client and should be viewed with scepticism, while articles or TV appearances in respected publications have the advantage of third-party validation and are generally viewed more favourably.⁸⁰

For a listing of PR agencies in the U.S., please refer to page 73 in the Glossary.

6.3 Consultants

There is a wide range of consulting/market entry agencies and independent consultants available to assist foreign companies looking to enter or sell products in the U.S. market, with services covering market assessment/research, market setup, recruitment, sales & channel development, marketing and etc. Fees vary depending on services required, but typically can be negotiated on a per project or retainer/success fee basis.

Singapore companies generally hire U.S. consultants to leverage their local expertise, industry contacts and knowledge of the U.S. operating environment. Consultants are also useful to supplement early staffing requirements, such as if you are planning to set up a local/U.S. branch office. However, consultants can be expensive and are not recommended as a long-term strategy.

The following case study by Jump Start Global Advisors on assisting Pteris Global with U.S. market entry may be useful:

Singapore-based Pteris Global Limited, one of Asia's leading airport logistic equipment companies, has worked on over 120 global airport baggage handling system projects primarily throughout Asia and the Middle East. Pteris wanted to bid on United States federal, state and local infrastructure projects funded in part by 2009 American Recovery and Reinvestment Act.

Jump Start Global established Pteris Global (USA) Inc. as a Delaware Corporation and helped them recruit an American general manager who had more than 20 years' experience in working for control and conveyor systems companies. The new corporate entity identified four initial United States airport projects that it wanted to submit bids on. Working together, Jump Start Global helped the company to obtain "Authority to Conduct Business and Contracting Licenses" in the four relevant states which qualified Pteris Global (USA) to bid on the projects.

On April 24, 2009, Pteris Global (USA) was successfully awarded its first U.S. contract -- a USD17 million (SGD23 million) project for Turner Construction to engineer, supply and install a baggage handling system at Phoenix Sky Harbor Airport.

For a listing of consultants in the U.S., please refer to page 69 in the Glossary.

⁸⁰ Source: <https://www.forbes.com/sites/robertwynne/2013/04/10/what-does-a-public-relations-agency-do/#4743f50775d9>

7. Glossary

7.1 Incorporate – Legal, Tax, Finance

Area of Expertise	Company	Company Profile	Contact point	Address	Coverage
Legal - incorporation & IP	Gordon & Rees https://www.gordonrees.com	G&R is a mid-size law firm that practices nationwide. Practice areas include agriculture and green tech.	Kimberley Chen Nobles (Partner) knobles@grsm.com	275 Battery Street, Suite 2000 San Francisco, CA 94111 T: 415-986-5900	US
Legal - International Trade	Venable Law www.venable.com	Venable Law is a nationwide, bipartisan practice that focuses on helping clients comply with regulations regarding political activity.	Jeff Weiss, Partner, International Trade Group jweiss@venable.com	600 Massachusetts Ave. NW Washington, DC 20001 T: 202-344-4000	New York, Maryland, Washington D.C.
Legal - IP	Finnegan, Henderson, Farabow, Garrett & Dunner http://www.finnegan.com/	One of the largest IP law firms in the world: - Render IP legal advisory and consulting for corporates with business interests in the U.S and Europe in three key areas, (a) IP strategy, (b) patent protection and (c) patent litigation. - Focused sectors: Electronics, Semiconductors, Automotive, Biomed, Infocomm/Tech/IoT	Kenie Ho, Partner kenie.ho@finnegan.com	901 New York Avenue, NW Washington, DC 20001 T: 202-408-4000	US
Legal Incorporation - general	Lubna Manasawala www.lubnamanasawala.com	This is a sole proprietorship focused on immigration law, assisting companies to secure US work visas such as the L1 and H1B1 visas.	Lubna Manasawala (Attorney at law) lubnamanasawala@gmail.com	149 W 28th Street, Suite 3 New York, NY 10001 T: (646) 820-4215	New York
Legal incorporation - general	ECYT www.ecytlaw.com	Home-grown law firm that is able to advise SME clients on international and cross border corporate law. Office in SF. Focus on start-ups	Eric Chew, Director Debbie Lee, Associate general@ecytlaw.com	WeWork (600 California St SF)	Singapore
Legal incorporation - general	Haynes Boone www.haynesboone.com	Haynes and Boone is an international corporate law firm with more than 600 lawyers. It is willing to work on alternative fee arrangements beyond the standard hourly rate arrangement.	George Y. Gonzalez, Partner george.gonzalez@haynesboone.com	1221 McKinney Street Suite 21007Houston, TX 77010 T: 713.547.2011	Texas, New York, Illinois, California, DC, Colorado
Legal incorporation - general	JumpStart Global Advisors http://www.jumpstartglobal.com/	JumpStart Global Advisors is a subsidiary of Gordon Global Associates, a boutique firm that provides a range of incorporation related services, from legal set-up to administration, such as supplying virtual offices/ market presence.	Scott Gordon Managing Director, scott@gordonglobal.com	375 Sunrise Highway Lynbrook, NY 11563 T: +1-516-593-5633	New York
Legal incorporation - general	Nixon Peabody http://www.nixonpeabody.com/index.aspx	Nixon Peabody is a full-service, global law firm that practices nationwide, with more than 650 attorneys. Key practice areas include technology, IP and cross-border M&A activity. Managing Partner for Asia based in HK, David. They have a partnership with a local SG firm Angeline Suparto Law Corporation to cover SG.	David Cheng (Partner, China & Asia Pacific) dcheng@nixonpeabody.com	One Embarcadero Center, Suite 1800 San Francisco, CA 94111-3600 T: +1 650 387 3948	US

Area of Expertise	Company	Company Profile	Contact point	Address	Coverage
Legal incorporation - general	Pillsbury www.pillsburylaw.com	Pillsbury is a full-service, global firm that practices nationwide, with more than 700 lawyers. Its focus is on energy and natural resources, financial services and F&B. Pillsbury touts its diversity, particularly in promoting women to top positions.	Stacie Yee (Partner) stacie.yee@pillsburylaw.com	725 S. Figueroa Street 2800 Los Angeles, CA 90017 T: 213-488-7100	California
Legal incorporation - general	Rooney Nimmo http://www.rooneynimmo.com	Rooney Nimmo is a boutique law firm with offices in New York, London, Edinburgh and San Francisco. Besides company incorporation, it also assists in other commercial matters such as contract negotiation.	Allan Rooney, Founding Partner allan.rooney@rooneynimmo.com	800 Third Avenue, New York, New York 10022 Tel: 212 545 8022 Fax: 646 417 7000	New York, San Francisco
Legal incorporation - general	SAX www.saxllp.com	<ul style="list-style-type: none"> Accounting & Auditing Advisory Services Consulting Tax Employee Benefit Plan Administration Valuation, Forensic and Litigation Support 	Jeffrey Proude, Partner jroude@saxllp.com	551 Madison Ave, 12 th Floor New York, NY 10022 T: 212-661-8640	New York
Legal incorporation - general	Sullivan & Worcester www.sandw.com/firm.html	Sullivan & Worcester is a full-service law firm with 175 lawyers, with their REIT and mutual fund practices earning top rankings.	Scott Kaufman, (Partner) skaufman@sandw.com	1633 Broadway New York, NY 10019 T: 212-660-3000	New York
Tax advisory	Armanino LLP http://www.armaninollp.com/	Armanino LLP is California's largest independent accounting and business consulting firm. It provides 4 main areas of service: assurance/ audit, tax, consulting and business management. It is part of the Moore Stephens International Limited association of accountants.	Jeff Ong-Siong Partner Jeff.OngSiong@armaninoLLP.com	11766 Wilshire Blvd, Los Angeles, CA 90025, United States T: +1 310-478-4148	California
Tax advisory	Dixon Hughes Goodman www.dhglp.com	Top 20 public accounting firms in the US - focusing on Assurance, Tax, and Advisory. It is a member of Praxity, an international association of independent accounting firms.	James D. Ewart, CPA/ABV/CFF, CVA Managing Director, DHG Valuation james.ewart@dhglp.com	4350 Congress Street Suite 900, Charlotte, NC 28209 T: 704.594.8105	13 States - including New York
Tax advisory	Early Growth Financial Services (EGFS) http://earlygrowthfinancialservices.com/	Outsourced financial services firm which provides small to mid-sized businesses with a cost-effective, integrated financial services solution. They provide CFO consulting for start-ups, specialising in tech coys, though they have also worked with Intl clients before	Lida Salgado contact@earlygrowthfinancialservices.com	5th floor, 2033 Gateway Pl, San Jose, CA 95110, United States T: +1 415-234-3437	California
Tax advisory	Ernst & Young http://www.ey.com/Home	Besides the usual tax advice, EY has expansive knowledge in federal and state level incentives for businesses.	Andy Baik International Director Sunghak.Baik@ey.com	One Raffles Quay, North Tower, Level 18	40 major cities through the US

7.2 Consumer – Market Entry Consultant

Area of Expertise	Name of Company	Company Profile	Contact point	Address	Coverage
E-commerce	Shopify www.shopify.com	Enables merchants to "incorporate" (integrate) on B2C online marketplaces. Also able to assist merchants in developing ecommerce website.	Mark Wang Head of Internationalisation mark.wang@shopify.com	NA	US / Canada
E-commerce (Amazon)	Brand Hut www.brandhutagency.com	Specialises in managing Amazon Sales channel for consumer brands	Nima Ahmadi Los Angeles nima@brandhut.com	NA	California
E-commerce (Amazon)	Dora Law www.dorahylaw.com	Specialises in managing Amazon Sales channel for consumer brands	Dora Law Founder dora@8lph8.com	Los Angeles	California
E-commerce (Amazon)	Hickory Flats hickory-flats.com	Cross border shipping, sourcing for manufacturers, matching to right marketplaces. Tim is a successful Amazon seller himself, and highly resourceful. Good contact to bounce ideas off with	Tim Jordan Co-founder tim@hickory-flats.com	NA	
E-commerce (Amazon)	Just One Dime https://justonedime.com	Strong testimonials from other Amazon sellers. Provides an online coaching course on Amazon	Seth Kniep President seth@justonedime.com	NA	Texas
E-commerce (Amazon)	YLH Enterprises www.formengifts.com	Specialises in managing Amazon Sales channel for consumer brands	Lloyd Yu Founder	Los Angeles	California
FDA	Registrar Corp http://www.registrarcorp.com/	Assistance with U.S. FDA Regulations Registrar Corp provides Registration, U.S. Agent, and Compliance Assistance for U.S. and Non-U.S. Companies in the Food and Beverage, Medical Device, Drug, and Cosmetics Industries. Registrar Corp assists businesses with U.S. FDA compliance. Registrar Corp is not affiliated with the U.S. FDA.	Vijey Ananda Regulatory Manager SE Asia vananda@registrarcorp.com	144 Research Drive Hampton, Virginia 23666 USA T: +1-757-224-0177	Virginia
FDA	EAS Consulting Group http://www.easconsultinggroup.com/	EAS Consulting Group, LLC (EAS) specializes in Food and Drug Administration (FDA) regulatory matters. Their prime focus is to assist domestic and foreign pharmaceutical, medical device, tobacco, food, dietary supplement, and cosmetic firms comply with applicable laws and regulations. EAS is staffed with former FDA compliance and inspection officials and industry executives, and is assisted by an extensive network of consultants with many years of FDA and industry experience.	Bryan Coleman Senior Director, Pharmaceutical & Device Consulting Services bcoleman@easconsultinggroup.com	EAS Consulting Group, LLC 1700 Diagonal Road, Suite 750 Alexandria, VA 22314 T: +1 571-447-5500	Virginia

Area of Expertise	Name of Company	Company Profile	Contact point	Address	Coverage
FDA	FDA Imports www.fdaimports.com	Assistance with U.S. FDA Regulations	William J Senior Partner wjsenior@fdaimports.com	810 Landmark Drive, Suite 126, Glen Burnie, MD 21061 T: 301-594-0510	Maryland
FDA	RWR Legal www.rwrlegal.com	Law firm with FDA arm	Richard Radbil , Client Relations richard@rwrlegal.com	620 Congress Avenue, Third Floor, Suite 320, Austin TX T: 512-320-0601	Texas
Food	Khong Guan www.khongguan.com.sg	Best known for their biscuits, but in the US they are also a distributor of Asian food. Willing to work with SG companies to bring their products to supermarkets (both ethnic and mainstream channels)	Albert Lin EVP	30068 Eigenbrodt Way, Union City, 94587 T: 510-487-7900	LA, California
Food	Prendergast & Associates www.restaurantproducer.com	Jerry is very experienced in the restaurant business, having helped multiple restaurants set up. He is familiar with current operating costs and revenues of establishments in LA & California in general. Also focused on Hawaii.	Jerry Prendergast Founder jerry@restaurantproducer.com	5107 Showboat Lane Culver City, 90230 T: 323-898-6776	LA, California
Food Packaging	Global Innovation Professionals LLC https://globalinnovate.net	Packaging consultant with focus on food and beverage products with a specialty in glass bottles and jars with international experience working in 50+ countries.	Jim Goldman , Packaging Consultant jim@globalinnovate.net	1000 Old Still Road Greensboro GA 30642 T: 1-678-431-5367	US
Food Packaging	Aripack Inc http://www.aripack.com	Sustainable rigid/flexible films packaging materials and equipment. Solutions provider for beverage, fresh, frozen and MAP applications. Worldwide green packaging leader in reducing carbon footprint.	Isak Bengiyat , President isak@aripack.com	1007 Sheffield Avenue, Brooklyn, NY 11207	US
Food Packaging	Silver Creative https://silvercreativegroup.com	Food consultancy with experience in Asian food brands.	Paul Zullo , Managing Director foodandbev@silvercreativegroup.com	50 Washington St 7th Floor Norwalk, CT 06854 T: 718-398-4850	US
Food Packaging	Intertek www.intertek.com/expert-services/packaging-consulting	Large consultancy providing worldwide services to the packaging and allied industries, including strategic, regulatory and environmental compliance.	web.cp-amer@intertek.com	T: 561-989-7294	US
General	Altios www.altios-international.com	Market expansion advisory consulting in areas such as market entry, incubation, investment, M&A, payroll & accounting outsourced services.	Tina Tan Outbound Business Developer t.tan@altios-international.com	10-34 44 th Dr. Long Island City, NY 11101 T: 212-260-5924	US / Singapore
Logistics	RushOrder rushorder.com	Cross border shipping, also can provide domestic merchant fulfillment services with own warehouse. Teck Wah is its strategic partner.	Dana Madlem VP Services dmadlem@rushorder.com	110 Airport Dr. E. Wappingers Falls, NY 12590 T: 845-463-3400	US

Area of Expertise	Name of Company	Company Profile	Contact point	Address	Coverage
Logistics	PIL Logistics USA www.pillogistics.com	Freight forwarder with experience across different product categories (incl chemicals) Specialises in cross-border shipping but also has its own warehouse in Los Angeles	Morgan Yau morgan.yau@lax.pillogistics.com	T: 424-331-5668	US
Logistics	AirGroup http://www.airgroup.com	Cross border shipping, e-commerce ready packaging	Debra Smythe Director of Sales dsmythe.san@airgroup.com	5950 Nancy Ridge Dr. Ste 100 San Diego, CA 92121 T: 877-736-0339	US
Food Packaging	ForeFront Packaging https://www.fcppackaging.com	Packaging and supply chain specialists for food products	info@fcppack.com 708-836-1105	1211 W 22nd St, Suite 905 Oakbrook, IL 60523 T: 708-836-1105	US

7.3 Consumer – Public Relations

Area of Expertise	Name of Company	Company Profile	Contact point	Coverage
Branding	Soon Yu www.soonyu.com	Advisory and consulting on how to build an iconic brand. Soon was formerly the VP of Innovation for VF Corporation, one of the world's largest fashion conglomerates, and also consults for VCs.	Soon Yu Founder soon@soonyu.com	San Francisco
Marketing partner	Alipay https://intl.alipay.com	Owned by Alibaba and widely used in China, accepting Alipay allows SG companies with brick and mortar presence in the US to more actively market its offerings, through running promotions via the Alipay app.	Helena Wang helena.wang@alibaba-inc.com	SF, California
PR	Bullfrog & Baum www.bullfrogandbaum.com	Hospitality & Lifestyle PR specialists - Communications, Digital Media, Integrated Marketing, PR, Talent Management, Design & Branding, Social Media Management	Aik Wye Ng Managing Director aikwye@bullfrogandbaum.com 56 W22nd Street New York, NY 10010 T: 212-255-6717	New York
PR	Glodow Neads Communication http://www.glodownead.com/	GNC is a full service PR firm that is focused on lifestyle companies, such as food & wine, real estate, design, spa, and consumer products.	Hwee Peng Yeo (Vice President, GNC Asia) hweepeng@glodownead.com	SF, California
PR	Golin golin.com	Large full-service PR agency that can cover branding to marketing. Strong focus on consumer	Jennifer Baker Executive Director Jbaker@golin.com	Los Angeles
PR	Jive Communications www.jivePRdigital.com	Social Media Marketing & PR firm that specialises in social media and influencer engagement strategies and advisory.	Almira Bardai , Partner (Vancouver & Toronto) almira@jivecommunications.ca * 901 King Street West, Suite 400, Toronto * 138 East, 7th Avenue, Suite 100, Vancouver Lindsay Nahmiache , Partner (Los Angeles) lindsay@jiveprdigital.com * 12655 W Jefferson Blvd, Los Angeles	Vancouver, Toronto, Los Angeles
PR	Launchpad Agency http://launchpadagency.com/	PR & Digital Marketing firm, which creates and implements fully integrated strategic campaigns through a wide range of marketing communications services including public relations, brand marketing, social media engagement and crowdfunding.	James Little , CEO james@launchpadagency.com Building D, 3rd Floor, 12777 W Jefferson Blvd, Los Angeles, CA 90066 T: +1 888-661-9711	
Social media	HYPR www.hyprbrands.com	HYPR positions themselves as one of the biggest influencer marketing agency in the US; and their core solution is essentially the social influencer platform which they have established. To-date, HYPR's platform has over 10 million influencers, with about 60% of them based in the U.S. HYPR's clients are majority brands and marketing/ ad agencies.	Corie Savage Senior Director of BD contact@hyprbrands.com T: 212-266-0067	NY

7.4 List of Food Associations

Name	Category	Description	Address	Contact Info
International Foodservice Manufacturers Association (IFMA) www.ifmaworld.com	Food Manufacturing	Founded in 1952, the International Foodservice Manufacturers Association is the premier organization for the industry's suppliers. Boasting the industry's most coveted operators' award, the Gold and Silver Plate, the group comprises the leading 300 suppliers. Its membership represents manufacturers, large and small, across every food category, as well as equipment and disposables. The organization also maintains strong relationships with hundreds of operators and distributors. Cost of membership is based on the size of the member company.	Two Prudential Plaza 180 North Stetson Ave., Ste. 4400 Chicago, IL 60601	Tel: +1.312.540.4400 Fax: +1.312.540.4401 Larry Oberkfell, President and CEO
Research Chefs Association (RCA) www.culinology.com	Food Manufacturing	The Research Chefs Association's 2,300 members, who are largely culinarians, food scientists, students, and manufacturers, are a microcosm of the food research and development world, reflecting the R&D process from concept to market. RCA's focus is clear, promoting its coined term and discipline culinology, the blending of culinary arts and the science of food.	330 N. Wabash Ave., Suite 2000 Chicago, IL 60611	T: 312-321-6861 rca@culinology.org
Manufacturers' Agents Association for the Foodservice Industry (MAFSI) www.mafsi.org	Food Manufacturing	MAFSI is everywhere food is. And everywhere you are. 270+ rep agencies, 220+ manufacturers and 2,400 members strong. Spanning North America, feeding 300 million people and changing an industry. From mom and pop restaurants, to colleges, hospitals, major chains – we're there. With the people, and the products - moving an entire industry further than ever before. And as members, we get to reinvent it. We get to make it better, and we make it different	1199 Euclid Ave. Atlanta, GA 30307	Tel: +1.404.214.9474 Fax: +1.404.522.0132 Alison Cody, Executive Director
American Culinary Federation (ACF) www.acfchefs.org	Food Service	ACF is the largest professional chefs organization in North America and boasts upward of 20,000 members in more than 225 chapters in four regions across the United States. In addition to chefs and cooks, members include culinary educators, culinary students, foodservice representatives and food enthusiasts. The organization, which offers culinary competitions, U.S. government-approved certification, a national apprenticeship programme, regional and national events as well as publications, helps to foster the growth of professional chefs in the foodservice industry.	180 Center Place Way St. Augustine, FL 32095	Tel: +1.800.624.9458 Fax: +1.904.825.4758 Heidi Cramb, Executive Director
Council of Restaurant and Hotel Trainers (CHART) www.chart.org	Food Service	The Council of Restaurant and Hotel Trainers develops hospitality-training professionals to advance training practices and improve operational results. The membership is made up of 40 percent representing full-service restaurants, 25 percent quick service or fast casual, 10 percent fine dining and 23 percent from hotels and resorts.	P.O. Box 2835 Westfield, NJ 07091	Tel: +1.800.463.5918 Fax: +1.908.389.0767 Tara Davey, Executive Director
International Franchise Association (IFA) www.franchise.org	Food Service	Among the 1,150 franchisor members of the International Franchise Association, restaurants and other foodservice businesses make up about 40 percent of the membership.	1900 K Street, NW Suite 700 Washington D.C.	T: 202-628-8000
Multicultural Foodservice & Hospitality Alliance (MFHA) www.mfha.net	Food Service	Membership in the Multicultural Foodservice & Hospitality Alliance is especially useful for foodservice operations that want to brand themselves as culturally diverse. A total of 67 foodservice operations have done so, as well as 700 manufacturers and individuals who are committed to the association's cause to help	1144 Narragansett Blvd. Providence, RI 02905	T: 401-461-6342 info@mfha.net

Name	Category	Description	Address	Contact Info
		companies attract, develop, and retain diverse and multicultural talent.		
National Restaurant Association (NRA) www.restaurant.org	Food Service	The father of all foodservice associations, the National Restaurant Association has its finger on the industry pulse, and membership allows access to research and benchmarking best practices to the 400,000 member locations with about 40,000 organizational members. The NRA has a dual membership agreement with 53 state restaurant associations, and as a result, the cost to join NRA varies by state. Industry advocacy is one of NRA's standout features, benefiting members and non-members. Membership, however, provides the opportunity to engage in the advocacy process.	1200 17th St., NW Washington, D.C. 20036	Toll: +1.800.424.5156 Tel: +1.202.331.5900 Fax: +1.202.331.2429 Dawn Sweeney, President & CEO
Women Chefs & Restaurateurs (WCR) www.womenchefs.org	Food Service	The organization, which offers networking and educational opportunities through its local exchanges, national conference and online forums, is dedicated to creating and expanding the professional and business opportunities for women in the industry. WCR also aims to provide support and foster an environment that ensures women equal access to the position, power and rewards offered by the restaurant industry.	115 S Patrick St., #101 Alexandria, VA 22314	T: 877-927-7787
Women's Foodservice Forum (WFF) www.womensfoodserviceforum.com	Food Service	The Women's Foodservice Forum helps women make strategic connections and develop as leaders in the foodservice industry. Focusing on 12 core competencies women must have to succeed, WFF's website offers free leadership competency assessment for members, from emerging leaders to executives, allowing them to choose programming based on their assessment and developmental needs.	6750 LBJ Freeway Dallas, TX 75240	Tel:+1.972.770.9100 Fax: +1.972.770.9150 Hattie Hill, President & CEO
Foodservice Consultants Society International — The Americas www.fcsi.org	Food Service	Foodservice Consultants Society International (FCSI) is the respected and truly professional organization of men and women offering design and management consulting services, specialized in the foodservice and hospitality industry, across the world.	3309 Robbins Road #171 Springfield, IL 62704 USA	Mr. Wade Koehler, CAE FCSI The Americas Phone: 309-808-2165 Fax: 309-585-2992
Society for Hospitality and Foodservice Management (SHFM) www.shfm-online.org	Food Service	The Society for Hospitality and Foodservice Management serves the needs and interests of executives in the corporate foodservice and workplace hospitality industries. When you're a part of the SHFM family you'll discover first-hand our passion to help you achieve your career and business objectives. SHFM members oversee all facets of corporate foodservice and workplace hospitality, from cafés and retail operations to catering, vending, fitness centers, child care services and conference planning and support, including audio/visual services. We represent the most influential professionals in the industry, the people who directly provide these services and oversee purchasing decisions for hundreds of business campuses and millions of employees.	455 S. 4th St., Ste. 650 Louisville, KY 40202	Tel: +1.502.574.9951 Fax: +1.502.574.3602 Tony Butler, Executive Director
National Council of Chain Restaurants (NCCR) www.nccr.net	Food Service	For more than 40 years, NCCR has worked to advance a public policy agenda that serves restaurant businesses and the millions of Americans employed by restaurants. Key issues include the Renewable Fuel Standard (food commodity costs), health care reform, swipe	325 7th St., NW, Ste. 1100 Washington, D.C. 20004	Tel: +1.202.626.8113 Fax: +1.202.626.8185 Rob Green,

Name	Category	Description	Address	Contact Info
		fees, immigration reform, tax reform and labor/management policies like overtime.		Executive Director
Foodservice Equipment Distributors Association (FEDA) www.feda.com	Food Service	FEDA serves distributors and dealers that meet FEDA membership eligibility requirements related to volume, operations, and ownership. FEDA members represent geographic diversity, based throughout the United States, Canada and the Virgin Islands.	2250 Point Boulevard, Ste. 200 Elgin, IL 60123	Tel: +1.224.293.650 0 Fax: +1.224.293.650 5 Tracy Mulqueen, CAE, Chief Executive Officer
International Foodservice Distributors Association (IFDA) www.ifdaonline.org	Food Service	IFDA is the premier trade association for the foodservice distribution industry. IFDA contributes to the growth, development, and success of the foodservice distribution industry through our outstanding advocacy, events, research, and education.	1410 Spring Hill Rd., Ste. 210 McLean, VA 22102	Tel: +1.703.532.940 0 Fax: +1.703.538.467 3 Mark Allen, President and CEO
Association of Nutrition & Foodservice Professionals (ANFP) www.anfponline.org	Food Service	Association of Nutrition & Foodservice Professionals (ANFP) is a national not-for-profit association established in 1960 that today has over 14,000 professionals dedicated to the practice of providing optimum nutritional care through foodservice management.	406 Surrey Woods Dr. St. Charles, IL 60174	Tel: +1.630.587.633 6 Toll: +1.800.323.190 8 Fax: +1.630.587.630 8 Joyce Gilbert, PhD, RDN, President & CEO
Foodservice Packaging Institute (FPI) http://www.fpi.org	Food Service	Founded in 1933, the Foodservice Packaging Institute (FPI) is the trade association for the foodservice packaging industry in North America. FPI promotes the value and benefits of foodservice packaging and serves as the industry's leading authority to educate and influence stakeholders. Members include raw material and machinery suppliers, manufacturers, distributors and purchasers of foodservice packaging.	7700 Leesburg Pike, Suite 421 Falls Church, VA 22043	Phone: (703) 592-9889 Fax: (703) 592- 9864 Lynn Dyer, President

7.5 Leading US Food Tradeshows

Name	Website	Location	Dates	Category focus
Winter Fancy Food Show	https://www.specialtyfood.com/	San Francisco	January	Specialty Food
International Production and Processing Expo	http://ippexpo.com/	Atlanta, Georgia	February	Poultry, Feed, and Meat technology exposition
Annual Meat Conference	http://meatconference.com/	Dallas	March	Meat and poultry products
New England Food Show	http://nefs.restaurant.org/Home	Boston	March	Foodservice
International Restaurant & Foodservice Show of New York	https://www.internationalrestaurantny.com/	New York	March	Food Services, Health Food, Coffee Fest
Vinexpo New York	http://www.vinexpo.fr/	New York	March	International wine and spirits
Natural Products Expo West	http://www.expowest.com/	Anaheim	March	Natural Products
Seafood Expo North America	http://www.seafoodexpo.com/north-america/	Boston	March	Seafood Suppliers and the whole supply chain
Snaxpo	http://snaxpo.com/	Orlando	March	Snack Food
Bellavita Expo	http://www.bellavita.com/	Chicago	May	Italian food and wine
Sweets & Snacks	https://sweetsandsnacks.com/	Chicago	May	Candy and snack
Summer Fancy Food Show	https://www.specialtyfood.com/	New York	July	Specialty Food
Western Foodservice and Hospitality Expo	https://www.westernfoodexpo.com/	Los Angeles	August	Food Services, Health Food, Coffee Fest
Natural Products Expo East	http://www.expoeast.com/ee18/public/enter.aspx	Baltimore	September	Natural Products
BioFach America	http://www.biofach-america.com/	Baltimore	September	International Organic Products
Americas Food and Beverage Show	https://www.americasfoodandbeverage.com/	Miami	October	Food suppliers and foodservice
The NACS Show	http://www.convenience.org/nacsshow/Pages/default.aspx	Las Vegas	October	Convenience Store
PMA Fresh Summit	https://www.pma.com/events/freshsummit	Orlando	October	Consumers, Floral, Food Safety, Foodservice
Private Label Trade Show	https://plma.com/	Chicago	November	Store brands

7.6 National Food Distributors

Name	Descriptions	Address	Distribution Categories	Market Coverage
Cheney Brothers https://www.cheneybrothers.com/contact-us/	Cheney Brothers is a leading food distributor serving the Southeastern United States and the world. If you require service by sea, air or land, Cheney Brothers can deliver on time and accurately. Whether your needs include meat, seafood, dairy, frozen food, dry grocery, disposables, equipment, supplies or chemicals, our team of export professionals can help you meet the challenging demands of doing business in your country.	1 Cheney Way, Riviera Beach, Florida 33404 T: (800) 432-1341	Food distribution	Nationwide
Cooper Booth Wholesale http://www.cooperbooth.com/	Cooper-Booth Wholesale is a full-service convenience store distributor ordering grocery, food service, candy, and tobacco items.	200 Lincoln W Dr.200 Lincoln W Dr Mountville, PA T: 800-992-0592	Full service convenience store distributor	Mid-Atlantic
Food Services of America http://www.fsafood.com/	Food Services of America is a privately-held, family-owned broadline foodservice distributor.	16100 N. 71 st Street, Suite 400 Scottsdale, AZ T: 480-927-4000	Foodservice distributor	Mid-West
Labatt Food Service http://www.labattfood.com/	Labatt Food Service is the tenth largest foodservice distributor in the nation.	4500 Industry Park San Antonio, TX T: 210-661-4216	Foodservice distributor	Nationwide
Performance Food Group http://www.pfgetc.com/	Performance Food Group is a distributor of over 150,000 food and related products.	12500 West Creek Parkway, Richmond, VA 23238 T: 804-484-7700	Food distributor	Nationwide
Shamrock Foods https://www.shamrockfoodservice.com/	Shamrock Foods is a nationally-ranked foodservice distributor.	3900 E Camelback Rd Ste 300 Phoenix, AZ 8501 T: 602-233-6400	Foodservice distributor	Southwest
Sysco http://www.sysco.com/	Sysco is the global leader in distributing food products to restaurants, healthcare, and educational, and hospitality locations.	1390 Enclave Parkway Houston, TX 77077-2099 T: 281-584-1390	Food products distributor	Nationwide
Reinhart Foodservice http://rfsdelivers.com/	Reinhart distributes to independent restaurants to delis, sporting venues, schools, nursing homes, hospitals, the military and renowned chain accounts.	6250 N River Road - Suite 9000 Rosemont, IL 60018 T: 847-227-6500	Foodservice distributor	Nationwide
US Foods www.usfoods.com	US Foods is a leading foodservice distributor that supplies national brands ranging from fresh meats and produce to pre-packaged and frozen foods.	1051 Amboy Avenue, Perth Amboy, NJ 08861 T: 847-720-8000	Foodservice distributor	Nationwide
Aramark https://www.aramark.com	Global Food Facility Operator	1101 Market Street, Philadelphia, Pennsylvania, United States T: 800-388-3300	Food and facilities services	Nationwide
Fresh Del Monte Produce, Inc. https://freshdelmonte.com/	Fresh Del Monte produces, markets and distributes a variety of fruit, vegetable, juice and snack products.	DEL MONTE FRESH PRODUCE N.A., INC. P.O. BOX 149222 CORAL GABLES, FL 33114-9222 USA T: 305-520-8400 / 800-950-3683	Fruit, vegetable, juice, snack products	Nationwide
United Natural Foods, Inc. https://www.unfi.com/	United Natural Foods distributes natural, organic and specialty foods throughout the United States and Canada.	313 Iron Horse Way Providence, RI 02908 T: 401-528-8634	Organic and specialty foods and non-food products	Nationwide

Name	Descriptions	Address	Distribution Categories	Market Coverage
Core-Mark Holding Company, Inc. www.core-mark.com	Core-Mark Holding Company, Inc. markets fresh and broad-line supply solutions to the convenience retail industry.	395 Oyster Point Boulevard Suite 415 South San Francisco, CA 94080 T: 650-589-9445	Food/Non-food products distribution	Nationwide
SpartanNash Company http://www.spartannash.com/	SpartanNash Company distributes and retails grocery products. It operates in three segments: Food Distribution, Military, and Retail.	850 76th Street, SW PO Box 8700 Grand Rapids, MI 49518 T: 616-878-2000	Grocery Products	Nationwide
The Chefs' Warehouse, Inc. http://www.chefwarehouse.com/	The Chefs' Warehouse, Inc., together with its subsidiaries, distributes specialty food products in the United States and Canada.	100 East Ridge Road Ridgefield, CT 06877 T: 203-894-1345	Food Products	Nationwide
Baldor Specialty Foods, Inc. www.baldorfood.com	Baldor Specialty Foods, Inc. distributes fresh produce and specialty food in Northeast and Mid-Atlantic regions.	155 Food Center Drive, Bronx, NY 10474 T: 718-860-9100	Fresh products and specialty food	Northeast, Mid-Atlantic
Atlantic Dominion Distributors www.atlanticdominiondistributors.com	Atlantic Dominion Distributors offers distribution and transportation services.	5400 Virginia Beach Blvd, Virginia Beach, VA 23462 T: 757-497-1001	Food distributor	South eastern
AMCON Distributing Company www.amcon.com	AMCON Distributing Company, together with its subsidiaries, engages in the wholesale distribution of consumer products in the Central, Rocky Mountain, and Southern regions of the United States.	7405 Irvington Road, Omaha, NE 68122 T: 402-331-3727	Wholesale Distribution and Retail Health Food.	Midwest
Family Food Brokers www.familyfoodbrokers.com	Family Food Brokers, located in Fort Lauderdale, Florida, is involved in the business of marketing and selling food. Good food, wholesome, healthy, and delicious food. Our mission is to represent companies that can consistently deliver quality food, on time and competitively priced.	3800 Inverrary Blvd. Lauderhill, FL 3319 T: 954-739-3339	Food Broker	Nationwide
Khong Guan www.khongguan.com	KGC is a US-based company (subsidiary of Khong Guan) specializing in the product development and marketing of its namesake biscuits, as well as Asian food brands across the U.S.	30068 Eigenbrodt Way Union City, CA 94587 T: 510-487-7800	Food Distributor	Nationwide & Canada
Restaurant Depot www.restaurantdepot.com	Restaurant Depot is a wholesale cash and carry foodservice supplier where you'll find quality products at low prices. We sell a broad selection of products for independent restaurants, caterers and non-profits.	1611 E Washington Blvd. Los Angeles, CA 90021 T: 718-762-8700	Restaurant Wholesale Distributor	Nationwide
West Central Food Services www.westcentralfoodservices.com	West Central Foodservice Corporate headquarters are strategically situated in our 180,000 sq. ft. distribution facility in Norwalk, CA to serve customers from Santa Barbara to the Mexican border. We also have large warehouse distribution centers in Arizona and Las Vegas. All of our facilities are custom-designed with temperature controlled units for a single purpose; to bring the best quality produce from the field to your table. We manage our fleet of 130 radio-controlled, refrigerated delivery trucks and operations with the latest in computerized communications to effectively merge modern technology with four generations of proven, hands on experience.	1280 Leyva St. Norwalk, CA 90650 T: 800-464-8349	Fresh products and specialty food	Southern California
Better Life Organics www.betterlifeorganics.com	Distributor of fine organic produce and food products nationwide	2020 East Seventh Place, Los Angeles, CA 90021	Organic food products	Nationwide

Name	Descriptions	Address	Distribution Categories	Market Coverage
		T: 213-623-0640		
Pitco Foods www.pitcofoods.com	PITCO Foods is the leading wholesale distributor in California, focusing on independent stores, covering a large territory from Napa Valley to Fresno. We supply all your business needs from grocery to HABA, from refrigerated to frozen, from Hispanic to Asian items, and from Dollar items to product displays/racks. We provide dependable service in our 4 warehouses totalling almost 500,000 sq.ft. Y	567 Cinnabar St. San Jose, CA 65110 T: 408-282-2241	wholesale food distribution	Northern California
Palo Alto Foods www.paloaltofoods.com	Palo Alto Foods is proud to be one of Northern California's leading wholesale food distributors with over 4,000 different beverage, center of the plate, specialty ingredients, dairy, grab-and-go and compostable disposables available for you to choose from... and we're also the Bay Area's largest frozen yogurt and soft serve distributor!	6691 Clark Ave. Newark, CA 94560 T: 510-456-2420	Wholesale food distribution	SFO / Bay Area
Pac Foods www.pacfoods.com	Pacific Food Distributors is a Master Food Service Distribution Company, otherwise known as a redistributor. We are located in Clackamas, Oregon, and provide quality products to meat markets, supermarkets, and food distributors in Oregon, Washington, Idaho, California, and Alaska	12300 SE Carpenter Dr. Clackamas, OR 97015 T: 503-607-1000	Master Food Service Distributor	West Coast
A & R Food Distributors www.aandrfoods.com	A&R Food Distributors is a prominent supplier of food and food related products to Public Schools, College/Universities, Healthcare, Hospitality, and various other Institutional Food Service partners.	1765 West Penhall Way Anaheim CA, 92801 T: 714-777-7742	Food & food related supplier	West Coast
Canton Food Co www.cantonfoodco.com	Canton Food Co. is a leader in the wholesale restaurant supply industry in the greater Los Angeles area. We are committed to provide the best quality products at the lowest prices and offer a great selection of food products, fresh produce & fruit, take out containers, cleaning supplies, beer, dairy & chesses, frozen food, grocery, meat & poultry, seafood, soft drink.	750 S. Alameda St. Los Angeles, CA 90021 T: 213-688-7707	Wholesale restaurant supply	Los Angeles area
Bayside Food Group www.baysidefood.com	Bayside Food Group is the premier distributor of many unique, high-quality gourmet, natural and organic specialty foods. Our distribution includes, but is not limited to, high-end regional grocers, leading specialty retailers, department stores and catalogue companies and gift packers located in California, Nevada, Arizona and Hawaii.	111 Center Avenue, Suite C, Pacheco, CA 94553 T: 800-321-3805	Natural & organic specialty food items	California, Nevada, Arizona, Hawaii
Astro Food Service www.astrofoodservice.com	Astro Food Service has grown to become one of Southern California's premier food service redistributors. Family owned and operated, Astro emphasizes its unique ability to meet the specific needs of the customer with a distinctive focus on personalized service and support.	1211 E. Wholesale St. Los Angeles, CA 90021 T: 213-532-3663	Food Distributor	Southern California
Richmond Wholesale www.richmondwholesale.com	Richmond Wholesale produces and stocks institutional and retail food products. Inventories of over 10,000 line items of frozen, chilled, and dry food products are maintained and updated daily.	2920 Regatta Blvd. Richmond, CA 94804 T: 510-233-5111	Frozen, Chilled, Dry Food Wholesale Distribution & Logistics	Nationwide

Name	Descriptions	Address	Distribution Categories	Market Coverage
Unfi (United Natural Foods) www.unifi.com	At UNFI, we're inspired by the unexpected. We look at things like our unmatched distribution network and 100,000 SKU assortment through a new lens. From gourmet and ethnic to fresh, prepared foods to specialty cheese - we cover everything in your store and kitchen. Energizing tomorrow, guiding a healthier road ahead.	250 Old Marlton Pike Medford, NJ 08055 T: 800-257-6174	Grocery, Frozen, Chill, Beauty, and more	US & Canada
Harvest Food Distributors www.harvestfooddistributors.com	Harvest Food Distributors provides coverage from coast-to-coast and can serve protein and perishable food producers, and independent retail and foodservice customers. The 600 strong Harvest Family is very proud of the company's 10 Distribution Centers supported by 12 sales offices across the United States servicing over 6,000 customers in the retail, foodservice, distribution, manufacturing and further processing segments.	1000 Bay Marina Drive National City, CA 91950 T: 800-653-2333	Food Distribution	Nationwide
Cerenzia Foods www.cerenziafoods.com	Here at Cerenzia we believe in Only the Best™. Our approach is simple, to provide quality products and unmatched customer service to everyone we do business with. Our foodservice distribution provides an incredible selection of products to ALL industries.	8585 White Oak Ave. Rancho Cucamonga, CA 91730 T: 909-989-4000	Foodservice Distributor	California
Renaissance Specialty Foods www.renaissancefoods.com	Renaissance Specialty Foods, Inc has been a distributor of the highest quality Gourmet, Natural, Organic and Ethnic products since 1990 in Northern California. Renaissance Specialty Foods, Inc distributes an exciting variety of domestic and imported specialty food products ranging from crafted European traditions to the most innovative items that the new generation of American chefs and entrepreneurs are bringing to market.	260 S. Maple Ave. South San Francisco, CA 94080 T: 650-873-5400	Natural & organic specialty food items	Northern California
JD Food www.jdfood.com	JD Food distributes to every type of food establishment imaginable, from HRI to golf courses and food manufacturers to grocery stores throughout much of California.	4671 E. Edgar Ave. Fresno, CA 93725 T: 559-445-1123	Food Distributor	California
Vitco Foods www.vitcofoods.com	Family-owned and locally operated for 15 years, Vitco Foods is the leading independent broadline distributor to independent and small chain restaurants across California.	715 E California St. Ontario, CA 91761 T: 909-355-1300	Foodservice distributor	California
Dove Distributors www.dovedistributors.com	Dove - We are a Vegan, Raw and Organic foods distributor based out of Richmond, CA. Our current territory is from Monterey to Reno. The accounts we are currently servicing include all the WF in the Northern California Region, along with the AB&C independent health food stores.	1900 7th St. Suite A Richmond, CA 94801 T: 510-260-0455	Organic & Vegan Distributor	Northern California
Dot Foods www.dotfoods.com	As the nation's first and largest food industry redistributor, Dot Foods' nine distribution centers serve all 50 states and over 25 countries. Family-owned and operated for more than 55 years, Dot takes pride in developing innovative solutions for manufacturers, distributors and operators.	1 Dot Way P.O. Box 192 Mt. Sterling, IL 62353 T: 800-366-3687	Food industry redistributor	Nationwide

Name	Descriptions	Address	Distribution Categories	Market Coverage
WebrestaurantStore https://www.webrestaurantstore.com/restaurant-consumables.html	WebrestaurantStore is the largest online restaurant supply store serving food service professionals and individual customers worldwide, with thousands of available products and over 5.5 million orders shipped. WebrestaurantStore focuses on convenience – online orders can be made 24 hours a day, 7 days a week, with fast shipping, low prices, and outstanding customer service.	2205 Old Philadelphia Pike Lancaster, PA 17602 T: 717-392-7472	Foodservice distributor	Nationwide

7.7 Top Ethnic Food Distributors

Name	Description	Address	Contact Info	Distribution Categories	Market Coverage
US Trading https://www.us-trading.com/en/	<p>U.S. TRADING CO. is a leading grocery and food service distributor of products from Thailand, Taiwan, China, Philippines, South Korea, Japan, and other countries around the world. The company caters to the food services, wholesale and the grocery industries. Products include rice, rice noodles, canned goods, sauces/seasonings, beverages, confectionary, snacks, frozen foods, and household items.</p>	<p>2118 Cabot Boulevard Haywad, CA 94545 T: 800-453-5502</p>	<p>info@ustrading.com</p>	<p>Food products from Thailand, Taiwan, China, Philippines, South Korea, Japan</p>	<p>Nationwide</p>
Golden Country http://www.goldencountry.com	<p>One of the largest Asian, African, Caribbean and Oriental wholesale food importers and distributors in the United States, carrying over 4000 dry and frozen products from Asia, Africa and the Caribbean, most of which are imported directly from manufacturers. Products are imported directly from China, Taiwan, Hong Kong, Thailand, Malaysia, Singapore, Indonesia, Korea, Vietnam, Jamaica and the Philippines.</p>	<p>2355 S. Blue Island Ave. Chicago, IL 60608 T: 773-847-1700</p>	<p>info@goldencountry.com</p>	<p>East Asian and Southeast Asian Food</p>	<p>Nationwide</p>
VW Asian Food https://www.vw-asianfood.com/	<p>The Viet-Wah Group is one of the largest Asian grocery importers, wholesale distributors and retailers in the Pacific Northwest. The Viet-Wah Group has been successful in forming alliances with quality and significant businesses that are major producers and processors of grocery and food items in Thailand, Vietnam, The Philippines, China and other Pacific Rim nations.</p>	<p>270 S. Hanford St. Building B Seattle, WA 98134 T: 206-621-8999</p>	<p>vw@vietwah.com</p>	<p>Asian Foods</p>	<p>Pacific Northwest</p>
Rhee Bros http://www.rheebros.com	<p>We are your one-stop provider for over 4,000 Pan-Asian foods spanning Chinese, Korean, Japanese, Vietnamese, and Filipino, and the breadth and depth of our product line is unmatched. We are continually growing our product line to include a perfect balance of top-selling foodservice and retail items from across Asia.</p>	<p>7461 Coca Cola Drive Hannover, MD 21076 T: 410-381-9000</p>	<p>* Chiamiao Ho chiho@rheebros.com * Yoon Seo Park yspark@rheebros.com * William Kim wkim@rheebros.com</p>	<p>Pan-Asian / Korean Food Import and Distribution</p>	<p>Nationwide</p>
Han Feng Inc http://hanfenginc.com	<p>Han Feng Inc. and its affiliates ("Han Feng Group" or "The Group") is the leader in providing Chinese restaurants located in the southeastern United States, (primarily Chinese takeout restaurants), with the highest quality of foods and supplies at a reasonable price. Since it is founded in 1997, Han Feng Group, with around 7,700 restaurant customers located in fourteen states, has captured the market at a decent annual growth rate. T</p>	<p>6001-A West Market St. Greensboro, NC 27409 T: 336-268-2080</p>	<p>info@hanfenginc.com</p>	<p>Chinese Food Services Industry (primarily takeout)</p>	<p>South Eastern USA</p>

Name	Description	Address	Contact Info	Distribution Categories	Market Coverage
Asia Foods Distributor http://www.asiadistributor.com/	Asia foods distributor inc. is one of the largest importers, wholesaler's & distributors of Bangladeshi Indian, Pakistani & Nepali products. This company previously known as Asia cash & cash inc.	59-56 56th Dr, Maspeth, NY 11378 T: 718-894-0071	asiafoodsdistributorinc@gmail.com	Asian Specialty Food	New York
Way Fong LLC https://wayfong.com/	Way Fong and its conglomerates are truly the one-stop shop with all-in-one service that provides what our customers truly needs. Synlyco was founded in 1992, its business includes wholesale, distribution, a retail store and two US Dept. of Agriculture (USDA) authorized meat processing plants. We are a company that is constantly searching for new opportunities, and has gradually become an all-around leader of food supply on the east coast.	57-29 49th St, Maspeth, NY 11378 T: 718-384-3838	sales@wayfong.com	Chinese Food	East Coast
Dynasty Wholesale Distributors http://www.dynastywholesale.com/	Since 1988, Dynasty Wholesale Distributors has been providing China restaurants with high-quality mugs, cups and other supplies for low prices.	88 Apollo St, Brooklyn, NY 11222 T: 718-782-0376	dynostocks@gmail.com	Chinese Food	New York
New York Mutual Trading Inc https://nymtc.com/	MUTUAL TRADING COMPANY INC. is the premier Japanese food, alcohol beverage, and restaurant supply specialist. Mutual Trading imports, exports, distributes and manufactures the top brands for our retailer and foodservice customers.	711 3rd Ave, New York, NY 10017 T: (212) 661-3333	mutual@nymtc.com	Japanese Food	New York Area
New Yung Wah Trading LLC http://www.nywtc.com/	New Yung Wah Trading LLC was established in 1993 and is committed to provide the food service and restaurant industries with the best and most efficient professional service possible throughout the Northeast region.	465 Morgan Ave, Brooklyn, Brooklyn, NY, 11222+5731, Brooklyn, NY 11222 T: (718) 388-3322	sales@nywtc.com	Chinese Food	New York
Daiei Trading Co http://daiei-trading.com/	Daiei Trading is one of the finest Japanese food importers on the American Market.	1450 128th St, Flushing, NY 11356 T: (718) 539-8100	daiei@daiei-trading.com	Japanese Restaurant Supplier	New York
Wismettac Asian Foods, Inc. http://www.wismettacusa.com/	Wismettac Asian Foods, Inc. (formerly Nishimoto Trading Co., Ltd.) is a vital part of Nishimoto Wismettac Group which has over 1,500 employees at 47 branches and offices globally and now generates over 172,000 million JPY sales in 2017. Wismettac Asian Foods, Inc. was established in Kobe, Japan in 1912 and is one of the oldest and most experienced importer, wholesaler and distributor of Asian food products in North America.	602 Washington Ave, Carlstadt, NJ 07072	(201) 804-1600	Asian Japanese Food	New York
MTC Kitchen https://www.mtckitchen.com/	Japanese restaurants supplier	711 3rd Ave, New York, NY 10017 T: (212) 661-3333	Info@mtckitchen.com	Japanese Food	New York

Name	Description	Address	Contact Info	Distribution Categories	Market Coverage
Wonton Food Inc http://www.wontonfood.com/	Chinese Guangdong food provider	183 E Broadway, New York, NY 10002	(212) 677-8865	Chinese Food	New York
Dainobu http://www.dainobu.us/	Compact Japanese market selling imported goods as well as grab-&-go prepared meal boxes & sushi.	36 W 56th St, New York, NY 10019	(212) 707-8525	Japanese Food	New York
Ocean Pacific Seafood Group	Ocean Pacific Seafood Group Inc. was founded in 2005. The Company's line of business includes the wholesale distribution of fresh, cured, or frozen fish and seafood.	22 Ash St Brooklyn, NY 11222 United States T: 718-272-5666	info@ospq.us	Seafood Supplier	New York
New Foods of India http://www.newfoodsofindia.com/	We offer a one stop for all your South Asian and Middle Eastern Grocery needs. We provide one of the largest ranges of authentic Indian groceries like Basmati Rice, Dry Fruits, Premium Spices, Masala Curry Paste, Snacks, Sweets and Teas delivered right at your doorstep.	121 Lexington Avenue, New York, NY 10016 T: 212 679-4444	info@newfoodsofindia.com	Indian and Middle Eastern Food	New York
Putul Distributors Inc http://www.putuldistributors.com/	South Asian Food Supplier since 2000	56-22 58th St, Maspeth, NY 11378 T: (718) 326-4061	Sales@putuldistributors.com	Southern Asia Food	New York
Maya Overseas Food https://www.mayafoods.com/	Maya Foods is a premier supplier of South East Asian groceries across America. With a promise to deliver premier quality, we have been supplying superior range of spices and grocery across America, so customers can enjoy a distinct taste & flavour on their dining table.	151 Fulton Ave, Garden City Park, NY 11040 T: (718) 894-5145	info@mayafoods.com	Indian, Pakistani & Bangladeshi Specialty Food	New York
LA Lucky http://www.lalucky.com/about-us	L.A Lucky Brand traces its roots back the founding of its sister corporation, Tong Enterprises. Established more than 25 years ago, Tong's warehouse in Hayward, California is strategically located to both receive shipments from Gemini Food and send out products to customers.	5699 Rickenbacker Rd. Bell, CA 90201 T: 323-224-0211	info@lalucky.com	Asian Food Supplier	California
Asian Foods Online http://sap.asianfoodsonline.com	Walong Marketing Inc. strives to provide the highest quality authentic Asian products to satisfy the demands of today's growing Asian populations, as well as to promote Asian foods to mainstream markets. Products imported from Taiwan, China, Korea, Japan, Thailand, Vietnam, Malaysia and other South-East Asian countries.	6281 Reglo Ave. Buena Park, CA 90260 T: 714-670-8899	info@walong.com	Asian Food	Nationwide
Dong Phuong Distributor https://www.dpdistributor.com/	Dong Phuong Distributor started in 1981 as a local distribution company in Edmonton, Alberta, Canada. We specialize in the import of products from all over Asia, sourced from regions such as China, Cambodia, Thailand, Taiwan, Vietnam, Malaysia, Philippines and the United States.	14818-131 Avenue Edmonton, Alberta - T5L 4Y3 T: 780-447-2883	info@dpdistributor.com	Asian Food	Alberta and Canada

Name	Description	Address	Contact Info	Distribution Categories	Market Coverage
Southeastern Food Supplies http://sefoodsupplies.com/	Southeastern Food Supplies is Florida's market leader in Asian Food Service. We service our restaurant, market, and distributor customers with the leading brands of authentic imported Asian foods as well as a full line of domestic commodity, grocery, packaging, meat, poultry seafood and produce items.	11077 Northwest 36th Avenue Miami, FL 33167 T: 305-688-2228	info@sefoodsupplies.com	Asian Restaurants	Florida
Phil Am Trading http://www.phil-am.com	Phil-am Trading Inc. is one of the leading importers of Filipino products on the east coast of the United States. We import and distribute a wide selection of frozen, canned and dry products, seasonings, and many grocery products. Our exclusive brands are: Phil-am, Silver Swan, Selecta, Magnolia, and Maalikaya rice.	324-330 Hoboken Avenue Jersey City, NJ 07306 T: 201-420-8595	sales@phil-am.com	Filipino Food	East Coast
Sun Hing Foods www.sunhingfoods.com	Ethnic Food Wholesaler and Distributor for supermarkets, restaurants, bakeries, and grocers	271 Harbor Way South San Francisco, CA 94080 T: 650-583-8188	Jon Soo, VP Sales & Operations jon.soo@sunhingfoods.com	Ethnic Food Products	US and Canada
Raja Foods / Patel Bros www.rajafoods.com	Indian/Ethnic Food Distributor and owner of Patel Brothers chains	8110 N. St. Louis Ave. Skokie, IL 60076 T: 847-675-4455	Swetal Patel, VP Sales swetal@rajafoods.com	Indian and Asian Food	Midwest, East Coast and South
JFC International www.jfc.com	JFC's mission is to increase the distribution of foods from Japan and the rest of Asia. Every day, we serve growing numbers of Asian-American retail outlets, restaurants, and major North American retailers.	7101 East Slauson Avenue Los Angeles, CA 90040-3622 T: 323-721-6100	Derek Kaneko, National Account Sales Manager dkaneko@jfc.com 323-721-6100	Japanese and Asian Food	Nationwide
Edward & Sons Trading Co. www.edwardandsons.com	Edward & Sons' Trading Company, Inc. was born out of a commitment to create delicious, wholesome foods featuring convenient preparation in step with busy, health-aware lifestyles. We travel the world tasting regional foods, sourcing the finest ingredients and partnering with the most talented and ethical farmers, packers and food artisans to create our unique range of organic vegetarian specialties.	4420 Via Real, # C Carpinteria, CA 93013 T: 805-684-8220	Alison Cox alison@edwardandsons.com	Vegetarian Groceries	Nationwide
Hong Thai Foods www.hongthaifoodsusa.com	Wholesaler/distributor of Asian foods based in Brooklyn, NYC	35 Browne St. Brooklyn, NY 11231 T: 718-237-1511	Sales@hongthaifoods.com	Asian Food - Thailand, Taiwan, Malaysia, China	Nationwide
Ace Natural www.acenatural.com	Distributor of Organic Products (including Asian) - located in New York	249-257 East Sanford Blvd. Mount Vernon, NY 10550 T: 718-361-5732	Howard Fried, Director howie@acenatural.com	Natural Food Products	New York Area
Eastland Foods www.eastlandfoods.com	Importer/Distributor of high-quality South East Asia brands/products	8305 Statyon Drive Jessup, MD 20794 T: (800) 645-0769	info@eastlandfoods.com	East Asian and Southeast Asian Food	Nationwide

Name	Description	Address	Contact Info	Distribution Categories	Market Coverage
BK Foods www.bkfoods.com	Full-service specialty foods distributor with large East Asian and Southeast Asian brands presence	200 Eagle Court, Swedesboro, NJ 08085-1799 T: (800) 354-9445	info@bkfoods.com	East Asian and Southeast Asian Food	Nationwide
Moghul Foods www.moghulfoods.com	Midwest Asian Food Distributor	384 Park Drive Troy, MI 48083 T: (248) 588-1211	azam@moghulfoods.com	South Asian and Middle Eastern Food	Midwest
Summit Import Corp www.summitimport.com	Asian Food Importer/Distributor established in 1955 and based in New Jersey, catering to both supermarkets and wholesale/industrial customers	100 Summit Place Jersey City, NJ 07305-9997 T: (800) 888-8288	info@summitimport.com	Asian Food	East Coast
Khong Guan www.kgusa.com	Singaporean food distributor based in West Coast	30068 Eigenbrodt Way Union City CA 94587 Tel: 877 889 8968	info@kgusa.com	East Asian and Southeast Asian Food	Nationwide and Canada
Asian Food Grocer https://www.asianfoodgrocer.com/about-us	AsianFoodGrocer.com's parent company CTC Food International has been in business since 1965 as a wholesaler, specializing in Asian food products and has a long, established history of customer satisfaction with competitive prices, quality, and customer service. AsianFoodGrocer.com is the online division that deals with smaller orders. Products are purchased in Asia and the Orient with offices located in northern, central and southern California, with strategically placed warehouses to help ensure product freshness.	50 W Ohio Ave Richmond, CA 94804 T: (888) 482-2742	info@AsianFoodGrocer.com	Japanese, East Asian Food	California
CTC Food International https://www.ctcfood.com	Since its inception in 1965 as the Oriental Trading Company, CTC Food International has brought authentic, high-quality Asian products to the US market through its private brand, Orchids. The CTC Foods client list includes some of the largest, fastest growing and most desired Asian and American food lines.	50 W Ohio Ave T: (510) 426-4330	info@ctcfood.com	East Asian and Southeast Asian Food	California
JC Trading http://www.jctrading.us	JC Trading is an Asian food importer/wholesaler with a 25-year history that specialises in the distribution of superior food products to the expanding Asian community through local Wholesalers, Grocers, and Restaurants. Their products can be found in various states throughout the country. Star items include premium rice, rice noodles, rice paper, coconut juice, frozen sticky corn, and dehydrated chili.	Richmond, CA 94804 (562) 949-2488	info@jctrading.us	Chinese and Southeast Asian Food	
United Asian Foods http://unitedasianfood.com	A family-owned and operated firm dedicated to bringing quality food from Southeast Asia to the American public. Carries a wide array of delectable food, all from well-respected brands, like Aroy-D and FOCO, which have proven particularly popular in the	5845 S. Malt Ave, Commerce, CA 90040 T: (323) 268-8818	uafoods@gmail.com	Southeast Asian Food	Nationwide

Name	Description	Address	Contact Info	Distribution Categories	Market Coverage
	Asian community. Imported products include tropical fruits, fruit juices, premium Thai jasmine rice, freshly frozen exotic fish, and every coconut and bamboo ingredient necessary to prepare authentic Thai cuisine.				
Empire International https://www.empire-international.com/about	Empire specialises in bringing Indonesian food to the US and represents major manufacturers such as Ayam Brand, Heinz ABC, Asian Home Gourmet, Indomie, Indocafe and Garuda peanuts. The company has a team of specialists to ensure that products imported into the US meet FDA regulations and will work closely with the manufacturer to ensure regulation conformity on product ingredients and packaging labels.	1351 East Chief Privado Ontario, CA 91761 T: (909) 923-8588	sales@empire-international.com	Southeast Asian Food	Nationwide

7.8 Largest U.S. Supermarket Chains

Rank	Company, Headquarters'	Location Units	Market Coverage	Onboarding new brands
1	Walmart Inc, BENTONVILLE, AR https://www.walmart.com	4,262	<p>As of 31 Jan 2018, there were 3,561 Walmart Supercenters in 49 of the 50 US states, Washington DC and Puerto Rico (Hawaii is the only state not to have a Supercenter location) and 701 Walmart Neighbourhood Markets. Supercenters stock general merchandise and a full-service supermarket (including meat and poultry, baked goods, delicatessen, frozen foods, dairy products, garden produce and fresh seafood), while Neighbourhood Markets focus on groceries and consumables, pharmacy products and at some stores, fuel.</p> <p>In Canada, Walmart operates in 410 locations (including 334 supercentres and 76 discount stores) and is headquartered in Mississauga, Ontario.</p>	<p>Potential suppliers must complete a supplier checklist and apply online (https://corporate.walmart.com/suppliers/apply-to-be-a-supplier). There are several categories to be considered for qualification: Store & Club, eCommerce, Marketplace or Direct Import.</p>
2	The Kroger Co., CINCINNATI, OH https://www.thekrogerco.com	2,789	<p>As of September 2018, Kroger operates (either directly or through its subsidiaries) 2,769 supermarkets and multi-department stores. It maintains markets in 35 states and Washington D.C., with store formats that include hypermarkets, supermarkets, superstores and department stores. Kroger-branded grocery stores are located in the U.S Midwest and South.</p>	<p>To be considered as a supplier to Kroger, a company must first obtain certification by a third-party agency CVM Solutions manages Kroger's database of suppliers. Apply for registration with CVM here: https://ascend.cvmsolutions.com/Register/Index?client=CVMSolutions</p> <p>The company must then complete registration in Kroger's Supplier Management System (https://www.thekrogerco.com/vendors-suppliers/supplier-hub/) to be considered by buyers.</p>

Rank	Company, Headquarters'	Location Units	Market Coverage	Onboarding new brands
3	Albertsons LLC, BOISE, ID https://www.albertsons.com	2,323	<p>Albertsons operates stores under the following banners:</p> <ul style="list-style-type: none"> - Acme: 178 locations (CT, DE, MD, NJ, NY and PA) - Albertsons: 575 locations (AZ, AR, CA, CO, ID, LA, MT, NV, NM, ND, OR, TX, UT, WA and WY) - Amigos: 4 locations (TX) - Carrs: 24 locations (AK) - Haggen: 15 locations (WA) - Jewel-Osco: 187 locations (IL, IA, and IN) - Lucky: 4 locations (CA, NV and UT) - Market Street: 12 locations (TX) - Pak 'n Save (CA) - Pavilions: 36 locations (Southern California) - Randalls: 44 locations (Greater Houston and Greater Austin) - Safeway: 1,308 locations (AK, AZ, CA, CO, DC, DE, FL, HI, ID, MD, MT, NE, NV, NM, OR, SD, VA, WA, WY) - Shaw's and Star Market: 169 locations (MA, ME, NH, RI and VT) - Tom Thumb: 64 locations (Dallas–Fort Worth metroplex) - United Supermarkets: 96 locations (North Texas, Texas Panhandle and New Mexico) - Vons: 325 locations (Southern California and Southern Nevada) 	Potential new vendors can register online for Albertsons here: https://www.rangeme.com/albertsons
4	Ahold-Delhaize, QUINCY, MA https://www.aholddelhaize.com/en/brands/united-states/	1,968	<p>Ahold Delhaize brands in the US operate a variety of store formats from hypermarkets to local supermarkets and convenience stores. In addition to major supermarket chains Food Lion, Giant Food (of Landover), Giant Martin's (of Carlisle), Hannaford, and Stop & Shop, the US stable also includes the online grocer, Peapod. There are more than 2,100 stores and distribution centers across 23 states, with a particularly strong presence in major markets along the East Coast.</p> <ul style="list-style-type: none"> - Food Lion: 1,027 locations in 10 Southeastern states - Giant-Landover: 167 locations in Delaware, Maryland, Pennsylvania, Virginia and Washington D.C. - Giant-Carlisle: 171 locations in Pennsylvania, Maryland, Virginia and West Virginia - Stop & Shop: 414 locations in the Northeast - Hannaford: 189 locations in the Northeast 	Potential new vendors can register online for Ahold Delhaize brands here: https://app.rangeme.com/suppliers/register/aholddelhaizeusbrands
5	Aldi Inc., BATAVIA, IL https://www.aldi.us/en/	1,815	Aldi has stores in 35 states, mostly on the East Coast, the South, the Midwest and California.	Prospective suppliers can fill out a "New Supplier Application" found here: https://corporate.aldi.us/en/suppliers/become-a-supplier/

Rank	Company, Headquarters'	Location Units	Market Coverage	Onboarding new brands
6	Publix Super Markets Inc., LAKELAND, FL http://www.publix.com	1,242	Publix operates throughout the Southeastern United States, with locations in Florida (817), Georgia (189), Alabama (73), South Carolina (61), Tennessee (45), North Carolina (42), and Virginia (15).	Potential retail product supplies should first identify the Corporate Purchasing Buyer responsible for their product category here: http://corporate.publix.com/business/publix-business-connection/retail-product-supplier . They can then follow instructions to complete an appointment request form and other necessary forms.
7	Sam's Club, BENTONVILLE, AR https://www.samsclub.com/sams/	597	As of January 2018, Sam's Club operates 597 membership warehouse clubs in 44 U.S. states (it does not operate in Alaska, Massachusetts, Oregon, Rhode Island, Vermont, Washington, nor Washington D.C.).	Potential suppliers can apply online here for both Sam's Club and Walmart, the parent company: https://rlogin.walmart.com/ElectronicAgreement/#/
8	Southeastern Grocers, JACKSONVILLE, FL https://www.segrocers.com	579	Southeastern Grocers has four brands under its banner in the Southeast: - Winn Dixie: 378 locations (AL, FL, GA, LA, MS) - BI-LO: 125 locations (GA, NC, SC) - Harveys: 51 locations (FL, GA, NC, SC) - Fresco y Más: 25 locations (FL)	Potential vendors must register on RangeMe: - Winn Dixie: https://app.rangeme.com/suppliers/register/winn-dixie - BI-LO: https://app.rangeme.com/suppliers/register/bi-lo - Harveys: https://app.rangeme.com/suppliers/register/harveys-supermarkets
9	Costco Wholesale Corp., ISSAQUAH, WA https://www.costco.com	528	As of October 2018, Costco has 528 warehouses in 44 US states and Puerto Rico, 100 in 9 Canadian provinces, and 38 in Mexico.	Prospective food vendors are asked to contact the appropriate division office listed here: https://www.costco.com/vendor-inquiries.html This website details a strategy for getting products into Costco: https://www.cpcstrategy.com/blog/2017/06/selling-to-costco/
10	Trader Joe's Co., MONROVIA, CA https://www.traderjoes.com	474	Trader Joe's has 460 stores nationwide in 43 states and in Washington, D.C.	Potential vendors must complete New Vendor Form - http://www.traderjoes.com/contact-us/new-vendor-form
11	Whole Foods Market Inc., AUSTIN, TX https://www.wholefoodsmarket.com	465	431 supermarkets in the United States, Canada, and UK.	Potential suppliers must create a company profile and upload your product information in order to be considered by the buyers - https://www.rangeme.com/whole-foods-landing
12	Giant Eagle, PITTSBURGH, PA https://www.gianteagle.com	434	Giant Eagle has stores in Pennsylvania, Ohio, West Virginia, Indiana, and Maryland.	Prospective vendors can find the relevant instructions and forms for food items here: https://marketpartners.gianteagle.com/content/Misc/DocumentsAndForms.aspx
13	H-E-B, SAN ANTONIO, TX https://www.heb.com	340	H-E-B has stores throughout the state of Texas.	Potential suppliers should visit https://heb.secure.force.com/Suppliers/suppliernethome and click on the "Work With H-E-B" tab to complete the form.
14	Hy-Vee Inc., WEST DES MOINES, IA https://www.hy-vee.com	266	Hy-Vee has supermarkets located throughout the Midwest in Iowa, Illinois, Kansas, Minnesota, Missouri, Nebraska, South Dakota, and Wisconsin.	Prospective vendors are asked to register on RangeMe: https://app.rangeme.com/suppliers/signup/hyvee

Rank	Company, Headquarters'	Location Units	Market Coverage	Onboarding new brands
15	SuperTarget, MINNEAPOLIS, MN https://corporate.target.com/article/tag/369/Super-Target	251	There are Super Target locations in 47 US states.	Prospective suppliers are required to register here: https://target.suppliergateway.com/Registration/Registration.aspx
16	Harris Teeter Inc., MATTHEWS, NC https://www.harristeeter.com	247	As of October 2018, the chain operates 246 stores in seven South Atlantic states: North Carolina, South Carolina, Virginia, Georgia, Florida, Delaware, Maryland, and the District of Columbia.	The relevant instructions and documents for prospective suppliers are available here: https://www.harristeeter.com/supplier-community
17	Meijer Inc., GRAND RAPIDS, MI https://www.meijer.com	242	About half of Midwestern supercenter chain Meijer's stores are located in Michigan, with other locations in Illinois, Indiana, Kentucky, Ohio and Wisconsin.	Prospective vendors are asked to register on RangeMe: https://app.rangeme.com/suppliers/register/meijer
18	Key Food www.keyfood.com	240	Key Food Stores Co-op, Inc. is a cooperative of independently owned supermarkets, founded in Brooklyn, New York. Key Food Stores has grown to over 240 supermarkets spanning all five boroughs, Long Island, upstate New York, New Jersey, Connecticut, and Pennsylvania .	The primary supplier of both A&P and Key Food is C&S Wholesale Grocers. Key Food Corporate Office 1200 South Avenue Staten Island NY 10314 United States T: 718-370-4200
19	BJ's Wholesale Club Inc., WESTBOROUGH, MA https://www.aldi.us/en/	216	BJ's operates warehouse clubs mainly in the East Coast (Maine, New Hampshire, Massachusetts, Delaware, Connecticut, Rhode Island, New York, New Jersey, Pennsylvania, Maryland, Virginia, North Carolina, South Carolina, Georgia, Florida, and Ohio).	Prospective vendors are asked to register on RangeMe: https://app.rangeme.com/suppliers/register/bis
20	The Save Mart Companies, MODESTO, CA https://www.savemart.com	207	The Save Mart Companies operates stores under the names of Save Mart, S-Mart Foods, Lucky and FoodMaxx in northern California and northern Nevada.	Prospective suppliers can find instructions and forms here: https://supplier.savemart.com/supplier
21	WinCo Foods LLC, BOISE, ID https://www.wincofoods.com	122	WinCo has stores in Arizona, California, Idaho, Nevada, Oklahoma, Oregon, Texas, Utah, and Washington.	Prospective vendors are asked to contact WinCo's buying team through their feedback form here: https://www.wincofoods.com/contact
22	Wegmans Food Markets Inc., ROCHESTER, NY https://www.wegmans.com	95	92 stores in the mid Atlantic and New England Regions	Link to Wegman's vendor guide - https://www.wegmans.com/content/dam/wegmans/pdf/suppliers/Wegmans-Vendor-Guide.pdf
23	DeMoulas Supermarkets Inc., TEWKSBURY, MA https://www.shopmarketbasket.com	79	DeMoulas Super Markets, Inc., under the trade name Market Basket, is a chain of 79 supermarkets in New Hampshire, Massachusetts, and Maine.	Contact the corporate office here: https://www.shopmarketbasket.com/about-us/contact-us
24	Gristedes http://www.gristedessupermarkets.com/	30	Gristedes operates over thirty stores throughout Manhattan, Westchester and Brooklyn including a store on Roosevelt Island.	Potential new vendors should add new products to their product submission form - http://www.gristedessupermarkets.com/product-submission-form/ Gristedes Corporate Office 823 11th Ave New York NY 10019 United States T: (212)580-6805

Rank	Company, Headquarters'	Location Units	Market Coverage	Onboarding new brands
25	Fairway Market https://www.fairwaymarket.com/	17	Fairway Market is an American grocery chain with 14 stores in the New York tri-state area, plus 3 liquor stores. The flagship store remains at Broadway and West 74th Street, on the Upper West Side of Manhattan.	Potential vendors should contact Fairway via the contacts us website page - https://www.fairwaymarket.com/contact-us/ Fairway Market Corporate Office Headquarters Address: 2284 12th Avenue New York, NY 10027 Corporate Phone Number:1-646-616-8000
26	Morton Williams http://www.mortonwilliams.com	15	Morton Williams is a family-owned and operated food retailer with eleven stores in the New York City Metropolitan area. Morton Williams stores feature ShopRite products as its private-label brand, and is supplied by the warehousing division of ShopRite's parent company, Wakefern Food Corporation.	Morton Williams Supermarkets 15 E Kingsbridge Road Bronx, NY 10468 T: (718) 933-5910

7.9 Major Ethnic Supermarket Chains

S/N	Name	Distribution Categories	Market Coverage	Description	Address	Contact Info
1	H Mart https://www.hmart.com	Korean and Asian Grocery Store	Nationwide	63-store Asian grocery chain supplying imported packaged foods, housewares and ready-to-serve meals.	38 W 32nd St, New York, NY 10001	(212) 695-3283
2	Kam Man Foods http://www.kammanfoods.com/en/index.asp	Asia Food Discount Market	North East	Leading Asian supermarket chain with stores located in New York, New Jersey and Massachusetts.	511 Old Post Road Edison, NJ 00817	(732) 248-9611
3	Good Fortune Supermarket http://www.goodfortunesupermarket.com/desktop.php?page=0	Asian Grocery Store	East Coast, Texas and California	Large Asian supermarket carrying fresh produce, seafood and groceries.	58-51 Maspeth Ave. 2FL, Maspeth, NY, 11378	(718) 326-8988
4	99 Ranch Market https://www.99ranch.com/	Asian Specialty Food	San Francisco	Asian supermarket chain carrying imported specialty foods plus meat, seafood, produce & baked goods.	250 Skyline Plaza, Daly City, CA 94015	(650) 992-8899
5	Super88 Market www.hongkonghypermart.com	Asian Grocery Store	Boston and Massachusetts	Supermarket chain operating in the Boston area.	73-79 Essex Street, Boston, MA 02111	(617) 423-3749
6	Asia Market Corporation http://www.asiamarketcorp.com/	Southeast Asian Market	New York Area	Busy, family-owned Southeast Asian market with produce and many rare imported foods.	71 1/2 Mulberry St, New York, NY 10013	(212) 962-2020
7	Asian Food Center http://www.asianfoodmarkets.com/	Asian Grocery Store	New York Area	A "one-stop shop" for Asian food needs with eight locations in New York and New Jersey.	1011 Us Highway 22, North Plainfield, NJ	(908) 668-8382
8	Super HK Supermarket https://www.superhkmarket.com/	Asian Grocery Store	New York Area	Busy Asian grocery store stocking imported specialty items alongside fresh meat, seafood and produce.	3711 Main St, Flushing, NY 11354	(718) 539-6868
9	Great Wall Supermarket	Chinese Supermarket	New York Area	Chinese supermarket chain with over 17 stores and 1,000 partners	59-16 99th St, Corona, NY 11368	(718) 271-1888

S/N	Name	Distribution Categories	Market Coverage	Description	Address	Contact Info
	http://gw-supermarket.com/					
10	Deluxe Food Market http://nymag.com/listings/restaurant/deluxe-food-market/	Chinese Supermarket	New York Area	Selling Chinese groceries, baked goods, sticky rice and far east-style sandwiches.	79 Elizabeth St., New York, NY 10013	212-925-5766
11	Chang Li Supermarket Inc https://www.changlisupermarket.com/	Asian Grocery Store	New York Area	Established, family-owned Asian grocery store featuring sizable fish, meat and produce departments.	2079 Benedict Ave, Bronx, NY 10462	(718) 828-8938
12	CAM Asian Market http://www.huaxin.us/english/aboutusE.htm	Asian Grocery Store	Ohio	Comprehensive and the largest modern Asian grocery store chain in Columbus, Cleveland, and Cincinnati.	Olentangy Plaza 817 Bethel Road Columbus, OH 43214	(614) 442-1888
13	C-Mart Supermarket http://www.cmartboston.com/	Imported Asian Grocery	Boston	Branch of a regional chain of grocery stores specialising in imported Asian foodstuffs.	109 Lincoln St, Boston, MA 02111	(617) 426-8888
14	Pacific Supermarket Inc.	Asian Specialty Food	New York Area	Grocery store offering fish, produce, as well as Asian specialty foodstuffs.	75-01 Broadway, Elmhurst, NY 11373	(718) 507-8181
15	Pacific Supermarket	Traditional Asian Grocery	San Francisco	Old-school supermarket providing a range of traditional Asian grocery items in a spacious building.	2900 Alemany Blvd, San Francisco, CA 94112	(415) 337-1628
16	Patel Brothers http://www.patelbrothers.com	Indian Grocery Store	Midwest, East Coast, South and California	52-store nationwide Indian grocers offering fresh produce and imported specialty items. Has an online shopping platform.	Patel Brothers 2410 Army Trail Rd. Hanover Park, IL 60133	(630) 213-2222
17	New York Supermarket	American and Asian Grocery Store	New York Area	Busy market offering familiar American and unique Asian groceries including produce, meats and candies.	75 E Broadway, New York, NY 10002	(212) 374-4088
18	New York Mart http://www.newyorkmart.com/en/	Chinese and Asian Grocery	New York Area	Large food market carrying a wide range of Chinese & Asian groceries, produce, meat, and sushi.	128 Mott St, New York, NY 10013	(212) 680-0178
19	New Kam Man Supermarket http://www.newkammman.com/	Asian Grocery Store	New York Area	Multi-level outfit stocking Asian groceries, housewares and beauty supplies.	200 Canal St, New York, NY 10013	(212) 571-0330
20	San Bruno Supermarket	Asian Dry Food	San Francisco	Basic grocery store supplying meat, fish, produce and dry goods (including Asian items). Offers free parking for customers.	2480 San Bruno Ave. San Francisco, CA 94134	(415) 468-5788
21	Assi Market http://www.assiplaza.net/	Asia Food Discount Market	East Coast	Premier destination for fresh, authentic Asian groceries at down-to-earth prices (four locations in GA, IL, and PA).	1630 Pleasant Hill Rd, Duluth, GA 30096-5899	(770) 921-4989
22	Capitol Supermarket http://www.capitolsupermarket.com/	Korean-American Grocery	DC	Family-owned grocery store that carries ethnic foods, private labels, meat and produce.	1231 11th St NW, Washington, DC 20001	(202) 289-1336
23	Duc Loi Supermarket	Vietnamese Grocery	San Francisco	Family-run market supplying a broad range of traditional Asian	2200 Mission St, San Francisco, CA 94110	(415) 551-1772

S/N	Name	Distribution Categories	Market Coverage	Description	Address	Contact Info
				grocery items and Vietnamese deli fare.		
24	Food Maxx International Food www.facebook.com/pg/FoodMaxx2/about/?ref=page_internal	International Grocery	Virginia	Brand new international food supermarket in Harrisonburg and Winchester, Virginia.	Food Maxx 924 W Market St Harrisonburg, Virginia	(540) 568-1811
25	Global Food International http://www.theglobalfood.com/	Korean Food Grocery	Virginia	Supermarket chain which specialises in selling Korean/international food with six locations in Maryland and Virginia.	13813 Foulger Square Woodbridge, VA 22192	(703) 897-6100
26	Hong Kong Supermarkets www.hongkonghypermart.com	Chinese Supermarket	New York Area	Chain of supermarkets located throughout New York City's three Chinatowns (and the rest of the country).	109 East Broadway, New York, NY 10002	(212) 227-3388
27	Hana Market	Japanese Grocery Store	DC	Compact grocery store offering traditional Japanese staples, including produce, snacks and candies.	2000 17th St NW, Washington, DC 20009	(202) 939-8853
28	Sunrise Mart http://sunrisemart-ny.com/default_eng/	Japanese Grocery Store	New York Area	Outpost of a local chain offering Japanese groceries and prepared foods such as sushi and bento boxes.	12 E 41st St, New York, NY 10017	(646) 380-9280
29	Woori Market https://www.woori-mart.com/	Korean-American Grocery	Princeton, New Jersey	Small Korean grocery store with produce, imported goods, snacks and prepared foods.	64 Princeton Hightstown Rd., Princeton Junction, NJ 08550	(609) 750-8888
30	May Wah Vegetarian Market http://www.maywahnyc.com/	Asian Vegan and Specialty Food	New York Area	Quaint market offering a selection of Asian vegan and special diet frozen food and spices.	213 Hester St, New York, NY 10013	(212) 334-4428

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