A long-exposure photograph of the Singapore skyline at night, with lights from buildings and the Esplanade - Theatres on the Bay reflected in the water. The Marina Bay Sands hotel is prominent on the left, and the Esplanade is in the foreground.

A Brewing Success:
*The Contribution of the Beer
Industry in Singapore*

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About Us

The Singapore Beer Industry Association (SBIA) is a non-profit organisation established in March 2018 to represent and champion the interests of the beer industry in Singapore. Comprising major beer brand owners such as Asia Pacific Breweries Singapore, Carlsberg Singapore, and Anheuser-Busch InBev, the SBIA is a platform for policy advocacy focused on the beer industry and other related issues¹.

The SBIA is committed to:

- (1) Building a thriving ecosystem in the Food and Beverage (F&B), hospitality and retail trade sectors in Singapore;
- (2) Reducing the misuse of alcohol; and
- (3) Embedding a responsible drinking culture, in an inclusive and collaborative approach with the Government and other key industry stakeholders.

By engaging in constructive dialogue and collaboration, SBIA aims to address industry challenges, support policy development, and promote the sustainable growth of the beer industry.

The association recognises the significant contribution of the beer industry to the Singapore economy, including the F&B sector, which employs a substantial number of individuals and plays a pivotal role in economic development. SBIA actively supports the interests of its partners in the F&B sector to ensure their voices are heard and concerns are addressed.



¹ www.sbia.sg

Executive Summary

This white paper explores the thriving beer industry in Singapore and its profound influence on the nation's economic growth, social progress, and environmental development. The paper was commissioned by the Singapore Beer Industry Association (SBIA) and prepared by Aroca Consulting Group.

The paper demonstrates how the beer industry is a key pillar of Singapore's economy, with a total direct economic impact valued at SGD 1.5 billion annually². It also stimulates additional economic activity across multiple sectors that stand at the frontline of

Singapore's flourishing economy, such as the F&B, hospitality, and tourism sectors, which contribute SGD 13 billion in GDP³.

The beer industry employs over 1,200 individuals directly and supports 265,000 jobs across related sectors⁴. As an intrinsic member of the broader F&B and hospitality sectors, the industry also significantly influences the tourism landscape.

The white paper explores the perspectives of both industry stakeholders and consumers regarding challenges faced by the beer industry, notably the rising production costs



² SBIA estimates.

³ [Singapore Department of Statistics | Press Release on Singapore's Services Sector \(singstat.gov.sg\)](https://www.singstat.gov.sg/news/press-releases/singapore-services-sector)

⁴ https://stats.mom.gov.sg/iMAS/Tables1/Time-Series-Table/mrsd_65_annl_emp_lvl_by_ind.xlsx



and inflationary pressures, and how they impact the broader F&B and tourism experience. Respondents also emphasised the potential adverse effects of government policies, such as tax hikes, on their businesses within the industry, potentially diminishing beer's distinctive role in Singapore's overall landscape. Singapore is already positioned among the world's most expensive countries for alcohol due to its high excise tax rates.

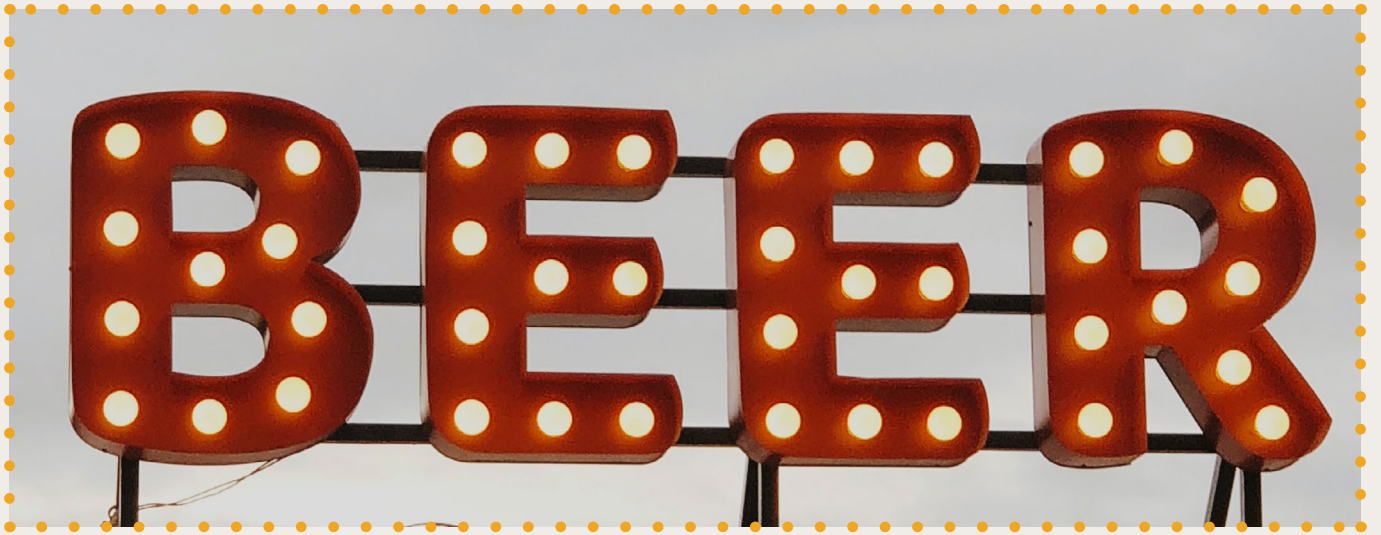
Beer's contribution to shaping Singapore's social dynamics is profound. According to an online survey conducted for this paper, beer is the most popular alcoholic beverage in Singapore, with 75 per cent of surveyed respondents placing beer in their top three alcoholic beverages of choice⁵.

Beer serves as a catalyst for socialising and community building. Coffee shops and hawker centres provide a communal space for locals and visitors to gather and enjoy a beer together, while beer also takes centre stage in upscale bars and nightclubs, offering a premium experience and elevating the overall experience.

This paper also highlights the various measures taken by members of the SBIA as responsible corporate citizens, implementing various initiatives to encourage responsible consumption and protect the environment through achieving net zero carbon emissions, maximising circularity, and conserving water.

⁵ Survey conducted by Merdeka Center of 600 Singapore citizens and permanent residents.

Introduction



In contemporary Singapore, beer plays a unique and significant role. This island nation, renowned for its dynamic business environment and progressive outlook, has nurtured a beer industry characterised by resilience, innovation and a sense of community. Beer has evolved beyond conventional boundaries in Singapore, transcending its role as a mere beverage to become a catalyst for economic growth and social cohesion.

To measure the contributions of the beer industry in Singapore, this white paper examines various factors that underscore its importance to both the economy and society, including:

- The global relevance of the beer industry, encompassing its impact on employment, both directly and through related activities.
- The array of key and emerging players in Singapore’s beer landscape, featuring established international brands and homegrown breweries.
- The direct and indirect economic effects of beer on Singapore, encompassing its contribution to GDP, job creation, its role in the broader F&B sector and its influence on international tourism.
- Beer’s role in enriching Singapore’s social fabric and fostering community bonds.
- How the beer industry upholds its responsibilities as corporate citizens.

Methodology

To quantify beer's impact on Singapore's economy and society, the SBIA undertook the following initiatives:

- Commissioned an online survey of 600 Singaporean citizens and permanent residents to gain insight into public perceptions regarding alcohol consumption. This survey was complemented by several focus group discussions to delve deeper into specific findings.
- Conducted 25 in-depth interviews with expatriates residing in Singapore and tourists visiting the country to better understand their alcohol consumption habits and their views on the F&B industry in Singapore.
- Interviewed over 20 food and beverage operators, including bars, coffee shops, restaurants, as well as retailers such as convenience stores, supermarkets, and minimarts, to assess the impact of alcohol on their businesses.





Beyond Borders: Understanding Beer in the Global Context

The beer industry holds immense significance globally, making a substantial contribution to the economy. In 2020 alone, the sector contributed a staggering USD 555 billion to the global economy, supporting 0.8 per cent of the global GDP.⁶ The impact of brewers' activities (i.e., expenditure throughout the value chain, employment value and taxes paid) accounted for nearly half of the total GDP impact, highlighting their pivotal role in driving economic growth.

The global beer industry's impact extends far beyond breweries. For example, for every job at a brewer, 29 jobs are created in downstream activities, such as the F&B services sector, or the upstream supply chain, involving farmers and raw material producers. Considering the combined impact across all three channels, this ratio expands to 39 jobs, reflecting the industry's broad employment generation.⁷

Moreover, the beer industry plays a significant role in supporting governments globally through substantial tax payments. In the form of beer sales tax, VAT, and excise, the sector contributes approximately USD 262 billion annually to government revenues.⁸

Furthermore, the economic impact of brewers extends beyond their direct activities. In 2019, brewers spent an estimated USD 118 billion on goods and services related to their products' production, supply chain and sales, supporting businesses of all sizes worldwide.⁹

In addition to its significant economic contributions, the profound social impact of the beer industries is exemplified in countries like Belgium and Ireland, where beer is embraced as an integral part of cultural identities. In Belgium, for example, beer-related festivals, events and breweries serve

⁶ Beer's Global Economic Footprint, Oxford Economics, <https://globalbeer.microsite.oxfordeconomics.com/>

⁷ Ibid.

⁸ Ibid.

⁹ Ibid.

as hubs for social interaction and celebration. Similarly, in Ireland, traditional Irish pubs serve as gathering places for locals and visitors, fostering a sense of belonging. In both examples, governments have actively

supported and safeguarded their rich beer cultures by implementing policies that preserve traditions, fostering an environment for the industry to thrive along with promoting responsible consumption.

Beer's distinctive importance within the F&B and visitor experience can also be witnessed in these countries which ingeniously integrate an F&B element as a unique value proposition in their tourism marketing campaigns to promote these destinations.

For example, in Belgium, the Flemish Ministry of Tourism invested €3 million (SGD 4.34 million) to put Belgian beer brewers on the tourist map and to improve the experience of the country's unique beer culture in and around the brewers.¹⁰ The Ministry of Tourism believes it is essential to notably support brewers, who have suffered economic losses during the pandemic, and the ongoing Russia-Ukraine conflict. In the case of Ireland, the nation's brand identity is inextricably intertwined with the iconic Guinness brand. In 2019, a whopping 1.7 million people visited the Guinness Storehouse in Dublin, making it Ireland's most popular fee-paying visitor attraction.¹¹ Furthermore, the Guinness



¹⁰ <https://www.brusselstimes.com/217874/flanders-invests-millions-to-promote-unique-beer-culture>

¹¹ <https://www.irishexaminer.com/business/arid-30976068.html>

Storehouse has been crowned Europe’s leading tourist attraction, and the Guinness Storehouse Experience – which tells the history of Ireland’s famous beer – was voted as Europe’s leading beer tour visitor experience, as part of the 2023 World Travel Awards.¹²

The National Tourism Development Authority of Ireland recognises the significance of the connection between Guinness and the nation in its tourism growth strategy. It aims to enhance the value of Irish tourism in the coming decade, leveraging Ireland’s remarkable food and drink offerings to provide

exceptional visitor experiences, extend visitor stays, and boost expenditure.

Similarly, Carlsberg’s guided brewery tours, like those in Copenhagen and Malaysia,¹³ play a crucial role in connecting the brand with its stakeholders and the public. These tours provide unique insights into the brewery’s rich heritage and brewing process, fostering a deep appreciation for the brand’s history and craftsmanship. Beyond mere entertainment, these initiatives also contribute to local economies by attracting thousands of visitors annually.



¹² <https://www.dailymail.co.uk/travel/article-12588877/Winners-Tourism-Oscars-revealed-Irelands-Guinness-Storehouse-named-tourist-attraction-Europe-2023-Miami-Beach-crowned-No-1-city-destination-North-America.html>

¹³ [VISIT CARLSBERG » Book Your Tour Now! « Carlsberg Malaysia](#)

Singapore Beer Industry Overview

The beer industry in Singapore has witnessed a remarkable journey of growth and transformation over the years. From its early

beginnings as a nascent market to its current thriving state, the industry has carved a niche for itself in the vibrant Singapore economy.

Key and Emerging Players

The beer industry in Singapore features a mix of established international brands and homegrown offerings. Leading international breweries have a strong presence in the market, offering popular beer brands that cater to a broad consumer base. Additionally, a vibrant craft beer movement has emerged in recent years, with local microbreweries and brewpubs gaining recognition for their quality and innovation.

The beer industry in Singapore is dominated by three major global players who are also the founding members of the SBIA. These companies not only distribute their brands but also showcase other popular international beer brands.

- **Asia Pacific Breweries Singapore** brews and sells its globally renowned brand Heineken in Singapore, and also owns the local iconic brand, Tiger Beer. Additionally, it distributes well-known brands like Guinness, Erdinger and Kirin.
- **Carlsberg Singapore** sells a mix of internationally famous brands such as Carlsberg, 1664 Blanc, and Somersby, and well-known local brands like Connors and Jing A.
- **Anheuser-Busch InBev** is another industry giant that owns globally recognised best-selling brands such as Corona and Budweiser.

Over the past decade, Singapore has also witnessed a growth in its craft beer breweries, with over 20 craft breweries currently operating in the city¹⁴. The growth of the craft beer industry has been fuelled by several factors, such as increasing demand from consumers

for novel and more unique flavours, and supportive government policies to encourage the growth of small and medium-sized enterprises in the F&B sector.



¹⁴ <https://www.channelnewsasia.com/singapore/in-focus-craft-beer-spirits-singapore-gin-alcohol-311046>

Singapore Beer Industry Contribution

Quantifying the Beer Industry's Economic Impact



Today, Singapore's beer industry is a significant contributor to the nation's economy both directly and in support of key sectors such as F&B, hospitality, retail, manufacturing and tourism.

It is estimated that the total direct economic impact of the industry amounts to more than **SGD 1.5 billion annually**.¹⁵ This consists of direct tax payments, wages, and revenue

generated minus production costs and services incurred.

For example, the beer industry contributed **SGD 424 million**¹⁶ into the nation's coffers through direct excise tax collections in 2022.

Furthermore, the industry spends approximately **SGD 168 million**¹⁷ in annual procurement related costs. This includes expenditure on goods and services related to production, supply chain and sales of beer. Some examples of this expenditures relate to logistics, transport, warehousing, packaging, and the design and production of marketing materials, often supporting businesses of all sizes in Singapore.

Finally, the direct economic impact, along with the accompanying increase in economic activity, is projected to expand as the market grows. It is anticipated that the beer market, which saw sales of 134 million litres in 2022,

¹⁵ SBIA estimates

¹⁶ <https://go.gov.sg/revenuestats-apr23>

¹⁷ SBIA estimates



will reach a volume of 140 million litres by 2025, further contributing to this growth.¹⁸ This is propelled by Singapore’s growing resident population, tourism, a vibrant food and beverage and nightlife scene and innovative product offerings, including low and zero-alcohol beer.

The industry is also a significant driver of employment in Singapore. It directly employs more than **1,200** individuals¹⁹ across the major brewers and distributors. These include jobs such as brewing and packaging beer as

well as other roles in administration, finance, logistics, marketing and sales.

Beer is the most consumed alcoholic beverage and a permanent feature on the menus of bars, hotels, coffee shops, restaurants, and nightclubs across the island. In this respect, it is a vital contributor to the F&B and hospitality sectors which together employ **265,000** workers across Singapore.²⁰ The important role beer plays in supporting the F&B sector is underscored by the first-hand views of operators shared later in this white paper.

¹⁸ Ibid

¹⁹ Ibid

²⁰ https://stats.mom.gov.sg/iMAS_Tables1/Time-Series-Table/mrds_65_annl_emp_lvl_by_ind.xlsx



In summary, the beer industry:

- Employs more than **1,200 individuals** directly and supports a further **265,000** across the F&B and hospitality sectors;
- Contributed **SGD 424 million** in excise tax payments on beer, ale and stout in 2022;
- Spends approximately **SGD 168 million** in annual procurement-related costs;
- Is an important component of the additional economic activity through the F&B, hospitality, and tourism industries, contributing more than **SGD 13 billion**²¹ to the country's GDP.

²¹ [Singapore Department of Statistics | Press Release on Singapore's Services Sector \(singstat.gov.sg\)](https://www.singstat.gov.sg)

First-Hand Perspectives of F&B Operators



The beer industry's wider contribution to the overall growth and prosperity of Singapore's F&B sector is further demonstrated by the in-depth interviews conducted for this white paper with senior management at F&B outlets such as pubs, coffee shops and restaurants, as well as retailers including convenience stores, supermarkets, and minimarts.

In recognising the critical role that beer plays for their respective businesses, respondents said:

- "Alcohol is critical to our business, it is the core of what we do, and beer is a very important part of this. However, beer is not cheap." Manager of a chain of pubs across Singapore
- "Beer is still a very important category for our business. When buying beer, they would also buy other related complementary categories." Senior Executive of a convenience chain
- "Beer is driving traffic and is important for complementary products such as snacks." Senior Executive of a supermarket chain

- “Beer is a foot traffic driver,” Senior Executive of a supermarket chain

- “People are more used to drinking at home now, and customers would drop by the minimart on the way home after work to buy beer. Therefore, alcohol sales have increased.” Minimart Store Owner, North Singapore

- “People come for the beer and to meet friends, so it has a critical role to play to get customers into our outlets.” Owner of a coffee shop chain

However, respondents also shed light on the potential challenges they faced, including possible tax hikes, and other obstacles:

- “If there is a significant tax increase, there will be an impact, and it will definitely take time to rebuild the customer base.” Minimart Store Owner, North-east Singapore

- “Tax increase will affect tourism. Huge impact. Tourists come here and say it is too expensive.” Pub Operator of a franchise across Singapore

- “Beer prices increasing is a major threat to the F&B sector. We only sell beer, and if this becomes unreachable for the locals, it will hurt our business significantly.” Owner of a coffee shop chain

- “A tax increase will be disastrous. Prices are already at SGD 16 to SGD 18 for a pint of Guinness and SGD 13 to SGD 16 for beer at most places. You want it to be affordable so that locals enjoy it. Also, so that tourists don’t have a heart attack when they see the bill.” Pub Operator of a franchise across Singapore

- “If taxes increase, we see two options; we would either have to pass it on, and then foot traffic would drop... If we can’t increase prices, we would have to cut other costs, such as staff.” Manager of a chain of pubs across Singapore.

- “Customers would probably change social patterns if taxes increased a bit, and behaviour would change to more drinking at home. Definitely less social interactions, venues will be affected, less social gatherings. Overall consumption may not change, but the economic benefit will change, it will shift more to retail.” Manager of a chain of pubs across Singapore.



Consumer Preferences and Perceptions towards Alcohol Consumption

For the purposes of this white paper, a quantitative survey was conducted among 600 Singapore citizens and permanent residents.²² The survey was commissioned to better understand the respondents' perceptions (both drinkers and non-drinkers) towards alcoholic beverages.

The topics covered include;

- Consumption behaviour
- Attitudes toward responsible drinking
- Perceptions on the regulations governing the alcohol industry
- Views on the price of alcoholic beverages
- The economic, social and cultural impact of the alcohol industry

²² Survey conducted by Merdeka Center of 600 Singapore citizens and permanent residents.

The survey found that:

- Beer is enjoyed in a wide variety of settings, however 77 per cent of respondents prefer drinking at home, followed by 45 per cent at bars, with 51 per cent drinking more often at home since the pandemic.
- Compared to pre-pandemic years, 20 per cent of the respondents now drink beverages with a higher alcohol content.
- 74 per cent think alcohol is somewhat expensive or overpriced.
- 58 per cent believe beer should be taxed differently from wine and spirits due to beer's lower alcohol content.

Of the other notable insights gathered from the survey:

- 52 per cent believe the alcohol industry makes an important contribution to the Singapore economy.
- 77 per cent of participants say a thriving F&B sector is crucial for Singapore to attract tourists and maintain a robust local economy.

These insights underscore consumers' perception regarding the beer industry's substantial economic significance and its multifaceted effects on Singapore's overall economic landscape.



Brewing a Memorable Experience for International Tourists



Having recognised the significant role that beer uniquely plays within the F&B sector, it is also critical to explore how the beer industry, and consequently the broader F&B landscape, exert a significant influence on tourism.

Tourism is a crucial component of Singapore's global appeal. It serves as a significant economic catalyst, generating employment opportunities. Additionally, it contributes to the city's identity as a lively and interconnected centre, facilitating the exchange of goods, services, ideas, experiences, and talent.

In 2019, tourism's direct contribution was 4 per cent²³ of the GDP, and the tourism sector achieved record highs in international visitor arrivals of 19.1 million visitors.²⁴ As Singapore progressively reopened its borders post-pandemic, visitor arrivals stood at 6.3 million visitors in 2022, surpassing the Singapore Tourism Board's (STB) forecast of 4 to 6 million visitors.²⁵

While Singapore continues reimagining itself as a destination of choice, one key trend remains the rising importance of experiential tourism experiences. Experiential tourism

²³ [Singapore: tourism direct GDP contribution 2019 | Statista](#)

²⁴ [STB Q4 2019 FA v7.pdf](#)

²⁵ [Visitor arrivals in Singapore creep back to pre-pandemic levels as tourism sector rebounds - CNA \(channelnewsasia.com\)](#)

products allow tourists to establish a close connection with the local culture, communities and habits, including the destination’s F&B culture. Food and beverages, including beer, are an integral part of the experience, as it creates a link to the unique culture of a place.

The importance of experiential tourism experiences was reinforced through insights gained from interviews with tourists visiting Singapore.²⁶

When asked about their F&B experience in Singapore, respondents said:

- “The food in Singapore is very good, there is a wide range of options available, and food is easy to order.” Rudolph from New Zealand
- “The F&B experience is very good, I love the variety of cuisines here due to the many influences (Chinese, Indian, Malay)... One of the best F&B scenes in the world in terms of quality and variety”. Allan from the Philippines
- “We have a very positive view of the F&B sector, particularly the hawker food and the outlets near Arab Street.” Patina from Germany



²⁶ Interviews conducted with visitors to Singapore by Aroca Consulting Group.

- “Singapore friends brought me to eat chicken rice, prata and chilli crab so far. I also enjoyed visiting tourist sites like Gardens by the Bay.” Naoko from Japan

However, some of the visitors interviewed raised that the prices of food and beverages, in particular alcohol, are much more expensive than in other countries in the region.

The visitors were also asked about their perceptions of prices increasing due to a tax increase on alcohol:

- “I will still visit restaurants but will not drink as much alcohol as before or have one drink only.” Naoko from Japan
- “Price increases on alcohol would definitely impact my consumption of alcohol negatively. I may take a moment to decide if I should have one or two beers today, I would “definitely” choose to have only one if prices were to rise”. Rudolph from New Zealand
- “If prices went up, I would not come back again and certainly would not drink in restaurants.” Gabriel from Belgium



- “I don’t know if I would spend on alcohol if it went up even more. Maybe just once or twice for a personal treat, but not much more.” Allan from the Philippines

Beer's Role in Enhancing Singapore's Social Fabric and Community Building



Across cultures and neighbourhoods, beer has played a significant role in social gatherings, celebrations, and shared experiences. It has a unique ability to transcend boundaries, connecting people from all walks of life and fostering a sense of camaraderie.

Beer is the most popular alcoholic beverage in the city-state, with 75 per cent of surveyed residents placing beer in their top three alcoholic beverages of choice.²⁷ Among the many beer brands available, Tiger Beer proudly stands as a national icon, symbolising

Singapore's identity and offering an exceptional opportunity to showcase the nation's spirit on the global stage. With its distinct flavour and quality craftsmanship, Tiger Beer embodies Singapore's essence, captivating locals and international enthusiasts alike.

Beer is an intrinsic part of Singapore's heartland culture, where a treasured tradition unfolds in the coffee shops, where locals and residents congregate to partake in the communal pleasure of beer consumption. These convivial gatherings epitomise the

²⁷ Survey conducted by Merdeka Center of 600 Singapore citizens and permanent residents.



harmonious fusion of diverse cultures: conversations flow freely, friendships are enhanced, and collective memories are forged. In addition, beer assumes a pivotal role during special occasions and festive celebrations, acting as a unifying force that fosters a profound sense of togetherness within the community.

In addition, beer brings adults of all ages together at cultural events such as Beerfest Asia, Oktoberfest, concerts as well as street festivals. Beer is also a central part of the celebrations at sporting events like the

Formula 1 Singapore Grand Prix, Tiger Beer Cup, and Rugby Sevens tournament.

The tropical climate of Singapore plays an instrumental role in shaping the fondness for beer over other alcoholic beverages. Residents often welcome a cold brew at the end of a long day dealing with the city's heat and humidity, adding a significant touch of enjoyment. It has become the go-to beverage among alcoholic drinks for a casual catch-up between friends, creating an ambience of relaxation and quality connections.

Beyond its refreshing appeal, beer's lower alcohol content and widely available zero-alcohol options compared to heavier drinks allow for socialisation while promoting responsible consumption. Around 60 per cent of the respondents to the survey agree that beer can be a good way of regulating one's alcohol intake. This aspect of beer resonates deeply with both residents and expatriates, as it aligns with their desires for a balanced and fulfilling life.

To sustain and further nurture the beer culture in Singapore, it is imperative to actively promote its significance and enrich its untapped potential as part of the city's overall

appeal. In doing so, Singapore can continue to showcase its vibrant F&B scene to the world, attracting the best talent and visitors alike. Through a concerted effort to elevate beer's status and preserve its integral role in Singapore's social fabric, the island nation can continue to celebrate and cherish the invaluable connections forged over a glass of its favourite brew.

The profound impact of beer on bringing communities together and facilitating greater social interaction is further demonstrated through the interviews, surveys, and focus groups.

When asked why beer holds such significance in Singapore's culture, respondents consistently highlighted its ability to foster a strong sense of community²⁸ :

- "Beer is a strong part of the culture in that it brings people together for social interaction." Owner of a coffeeshop chain
- "People come for the beer and to meet friends, so it has a critical role to play to get

customers into our outlet." Owner of a coffee shop chain

- "Beer is a strong part of the culture in that it brings people together for social interaction. Weather is a strong part of it as well, people want a refreshing drink." Owner of a coffeeshop chain

- "Usually, it's just bonding with friends after a week of work. You just want to sit back and have some food that goes well with beer like chicken wings and fries. And just to wind down and chill, relax." Focus group participant, Male 45-60 age group

- "Beer is an important part of social life... For me, hanging out at kopitiams is reminiscent of the German biergarten culture." Expatriate from Germany, living in Singapore for 2.5 years

- "I drink (beer) just to refresh myself because the weather is very hot. So open one (can) can relax, and sometimes watch soccer or some drama." Focus group participant, Male 45-60 years old

²⁸ Interviews conducted with F&B operators, retailers, global talents living in Singapore by Aroca Consulting Group as well as participant responses from focus groups conducted by Merdeka Center.

- “Very strong culture, coffee shops, uncles etc. People see beer as accessible and cheap.” Pub operator of a franchise across Singapore
- “You can see older uncles or aunties sitting around, they’re still bonding over alcohol in coffee shops.” Focus group participant, 18-30 years old
- “It is a go to drink. If we were to choose out of alcohol available in Singapore, beer has the strongest culture.” Pub operator of a franchise across Singapore
- “I believe there is a beer culture in Singapore, particularly the local beer and it is mostly related to the hawker centres which are very casual.” Expatriate from Australia, living in Singapore for 11 years
- “I really enjoy going to the hawker centre for a beer on the way home.” Expatriate from Sweden, living in Singapore for 3 years
- “It’s good that Singapore has its own beer brand to promote to foreigners.” Allan from the Philippines
- “Tiger experience should be a good hook to further promote the culture. Tiger should be a big part for tourists.” Pub operator of a franchise across Singapore
- “Tiger is important for tourist culture.” Pub operator of a franchise across Singapore
- “I drank Tiger beer at Boon Tong Kee. It is a nice beer. When overseas, I like to try local brands.” Naoko from Japan
- “Not familiar with local beers. I think that the presence of local and craft beer breweries would make a city more attractive, as I like to try local products when travelling.” Chris from the UK
- “Have to make Singapore really fun and have events come back strongly. An example would be the forthcoming Beer Fest. We need to invest in ideas, people and training. We need to work quickly; Singapore is not moving fast enough on this.” Pub operator of a franchise across Singapore



“My late father was a bus driver and deaf in one ear, so he usually doesn’t make friends easily. He had this regular group of coffeeshop drinking friends whom gave him support which he did not get in other settings. When my father passed away, his gang of beer drinking friends came for the funeral wake every night.

And I’m like, you know, if not for beer, if not for the relaxed setting, would any of those uncles actually have accepted my dad who was hearing impaired and not well educated?”

Focus group participant, Female, 30-50 years old

Responsible Corporate Citizens: Brewing for a Sustainable Future and Promoting Moderate Consumption



In recent years, the global community has become increasingly aware of the urgent need to address environmental challenges and adopt sustainable practices across all industries. The beer sector is no exception.

Recognising the importance of minimising its ecological footprint, the beer industry has taken proactive measures to adopt sustainable

practices throughout the various aspects of their respective businesses.

In alignment with the global movement towards sustainability, the three major beer suppliers in Singapore have embraced ambitious goals to reduce their carbon footprint and promote sustainable practices throughout their operations. Recognising the environmental challenges associated with the brewing industry, these companies are actively pursuing strategies to mitigate their impact and foster a more sustainable future.

SBIA members fully support the Singapore government's policy and regulatory efforts to reduce waste generation and increase recycling in the country. The association recognises that the Resource Sustainability Act (RSA), passed in 2019, plays an important role in Singapore's strategy to build a sustainable and resource-efficient nation in line with the Singapore Green Plan 2030 and the Zero Waste Masterplan. SBIA members are compliant with the Mandatory Packaging Reporting (MPR) Framework introduced in 2020 under the RSA, and look

forward to working closely with the Singapore Government and other industry stakeholders on the successful and smooth implementation of the Beverage Container Return Scheme (BCRS).

The sustainability commitments of the three major companies in Singapore's beer industry, by each company, is as follows –

Asia Pacific Breweries (APB) Singapore, Part of The HEINEKEN Company

As Singapore's largest brewery, APB Singapore puts sustainability and responsibility at the front and centre of its business. In 2021, HEINEKEN stepped up its ambition by announcing its Brew a Better World 2030 strategy, which has three pillars that guide its path to zero impact on the environment, an inclusive, fair and equitable world, and moderation and no harmful use of alcohol.

- **Mobilising global efforts on the path towards net zero:** APB Singapore's environmental sustainability agenda focuses on reaching net zero in Scope 1 and 2 by 2030 and achieving carbon neutrality across the value chain by 2040, maximising circularity by sending zero waste to the landfill, and conserving every drop of water.



- **Reaching net zero:** APB Singapore installed 8,030 solar panels on its brewery's roof, generating 2,590Mwh of clean electricity annually. They also provide partners with green fridges to halve the carbon emissions generated by refrigeration.

- **Driving circularity:** APB Singapore reuses and recycles 99 per cent of its waste and by-products. Annually, it repurposes



approximately 20,000 tonnes of its brewer's spent grains into animal feed for usage in farms. It also turns to reusable packaging where steel kegs are fully reusable, and more than 88 per cent of glass bottles are collected from the marketplace to wash and reuse.

- Maximising water circularity: APB Singapore is one of the first breweries in Asia to build a Water Reuse Treatment Plant to

treat wastewater, which reduces its annual intake of portable water by approximately 10 per cent. They built a Rainwater Harvesting System that collects more than 15,000 m³ annually of water for cooling and landscaping.

● **Walking the talk on the path to an inclusive, fair and equitable world:** APB Singapore's business thrives on fairness, human connection and the joy of bringing people together. It embraces fairness and inclusion, aims for gender balance at senior levels, pays employees a fair wage, and ensures the safety and well-being of its employees remain a top priority. APB Singapore also supports social and economic well-being by investing in community initiatives. The Asia Pacific Breweries (APB) Foundation was instituted in 1994 as the philanthropic arm to help people and social organisations improve talents, enhance educational and research endeavours as well as better living conditions.

● **Taking a consumer-centric approach on the path to moderation and no harmful use:** APB Singapore is dedicated to leading the debate on responsible consumption and using the strength of its brands to reach consumers to drive the message of zero-

tolerance towards harmful drinking. It is also empowering consumers with its growing low- and no-alcohol portfolio and advocating for labelling transparency for consumers to make an informed choice about the products they choose.

Carlsberg Group

As part of Carlsberg's ESG programme, Together towards ZERO & Beyond, the company commits to achieve net zero value



chain by 2040, outlined by focus areas that address the environmental, social and governance (ESG) topics that are most material to its business and to wider society.

The Carlsberg Group's ZERO targets are categorised into ZERO Carbon Footprint, ZERO Farming Footprint, ZERO Packaging Waste, ZERO Water Waste, ZERO Irresponsible Drinking and ZERO Accidents Culture. In addition to achieving the ZERO targets, the Group also focuses on other key topics such as Responsible Sourcing, Diversity, Equity & Inclusion, Human Rights, Living by Our Compass and Community Engagement.

These are some of the commitments:

- **ZERO Carbon Footprint:**
 - ZERO carbon emissions at its breweries and a 30 percent reduction of its value chain emissions by 2030; and
 - Achieve net ZERO carbon emissions across its entire value chain by 2040.

- **ZERO Farming Footprint:**
 - 30 percent of raw materials derived from regenerative agricultural practices and that are sustainably sourced by 2030; and
 - 100 percent of raw materials derived from

regenerative agricultural practices and that are sustainably sourced by 2040.

● **ZERO Packaging Waste:**

- 100 percent recyclable, reusable or renewable packaging; and
- a 90 percent collection and recycling rate for bottles and cans, and
- a 50 percent reduction of virgin fossil-based plastic, and
- a 50 percent recycled content in bottles and cans.

● **ZERO Water Waste:**

- 25% reduction in water usage at its breweries;
- Explore going below 2.0 HL/HL at all high-risk breweries
- Partner to safeguard shared water resources in high-risk areas

● **ZERO Irresponsible Drinking:**

- 100% responsible drinking messaging through packaging and brand activations
- 100% of its markets run partnerships to support responsible consumption
- 100% availability of alcohol-free brews
- 35% of its brews globally are low-alcohol or alcohol-free

● **Zero Accidents Culture:**

- A year-on-year reduction in the accident rate



Anheuser-Busch InBev

Anheuser-Busch InBev is one of the largest beer producers globally and operates in more than 150 countries, including Singapore.

As part of its efforts to create a more sustainable future, the company has committed to a series of actions until 2025, including:

- **Smart Agriculture:** AB InBev is committed to the vision of smart agriculture, aiming to

empower 100 percent of its direct farmers by 2025. Through direct sourcing programs and collaboration with agricultural development teams, the company engages with over 20,000 farmers across 13 countries. By focusing on priority crops like barley, hops, rice, maize, sorghum and cassava, AB InBev provides comprehensive support, including diverse crop varieties, training, timely insights and financial tools. This builds resilient supply chains and ensures long-term sustainability in agricultural practices.

- **Building watershed health:** AB InBev is committed to building watershed health by targeting high-stress areas and ensuring that 100 percent of their communities in such regions experience measurable improvements in water availability and quality by 2025. Recognising the significance of water resources, the company implements comprehensive initiatives to address this vital aspect of sustainability.

- **Driving sustainable packaging:** AB InBev is dedicated to driving sustainable packaging practices by setting a target to ensure that 100 percent of their products are packaged in materials that are either returnable or made from a majority of recycled content by 2025.

- **Championing low carbon technology:**

AB InBev champions the adoption of low carbon technology as part of their commitment to sustainability. The company sets ambitious targets to ensure that 100 percent of their purchased electricity comes from renewable sources.

- **Remuneration linked to sustainability:**

AB InBev implements a remuneration system that links sustainability-related targets to annual variable compensation across all levels of the company.

In addition, the beer industry is actively involved in various initiatives to promote the responsible consumption of alcohol in Singapore. For example, through the Singapore Alliance for Responsible Drinking (SARD), the SBIA participates in the annual #HowMuchIsTooMuch public awareness campaign to educate and inform people, especially young adults, on the facts about binge drinking and encourage more responsible alcohol consumption through a better understanding of one's limit.²⁹

²⁹ [SARD | SARD – Campaign for Responsible Drinking](#)

Conclusion



The beer industry in Singapore has achieved remarkable growth and transformation, becoming a significant contributor to the nation's economy.

However, it is clear that the industry is not without its challenges. To ensure the continued success and sustainability of the beer industry, it is crucial to support its growth.

Supporting the uniqueness of the beer industry can be achieved through a range of strategies, including implementing favourable government policies that create an enabling business environment for breweries. This involves considering factors such as taxation and regulations to ensure the industry can thrive.

Collaborative efforts between industry stakeholders, government entities, and other relevant parties are essential in collectively addressing challenges and finding innovative solutions.

By fostering strong partnerships and engaging in open dialogue, the industry can navigate obstacles more effectively and promote its long-term viability.

In addition, continued investment in research and development, sustainable practices, and

technology advancements can help the industry stay competitive and address environmental concerns. By adopting sustainable production methods, reducing carbon emissions, and managing water resources efficiently, the beer industry can contribute to Singapore's broader sustainability goals as outlined in the Singapore Green Plan 2030 and the Zero Waste Masterplan, as well as contribute to the country's commitment to achieve zero emissions by 2050 as part of its Long-Term Low-Emissions Development Strategy (LEDS).

Overall, it is paramount to recognise the challenges the beer industry faces and take proactive measures to support its growth. Given its substantial economic contributions, cultural significance, and potential for innovation and sustainability, the beer industry deserves attention and support as a fundamental pillar of Singapore's flourishing economy and vibrant social fabric.

By nurturing the industry and fostering an environment that enables its growth, Singapore can ensure the continued success and prosperity of this unique and integral sector.