

Singapore: A Small Asian Heavyweight
From a third world economy
to a financial and political leadership in 50 years



Giacomo Marabiso
Secretary General
Italian Chamber of Commerce in Singapore

Italian Chamber of Commerce in Singapore

Ufficialmente riconosciuta nel 2003

Associati: 210

Staff: 5 persone

Fatturato: Euro 800.000 (60% Servizi di Business Development).

Desk: Milano; Yangon

Dal 2014 ad oggi: Oltre 200 aziende asiatiche in Italia per missioni commerciali e partecipazione a fiere ed eventi;

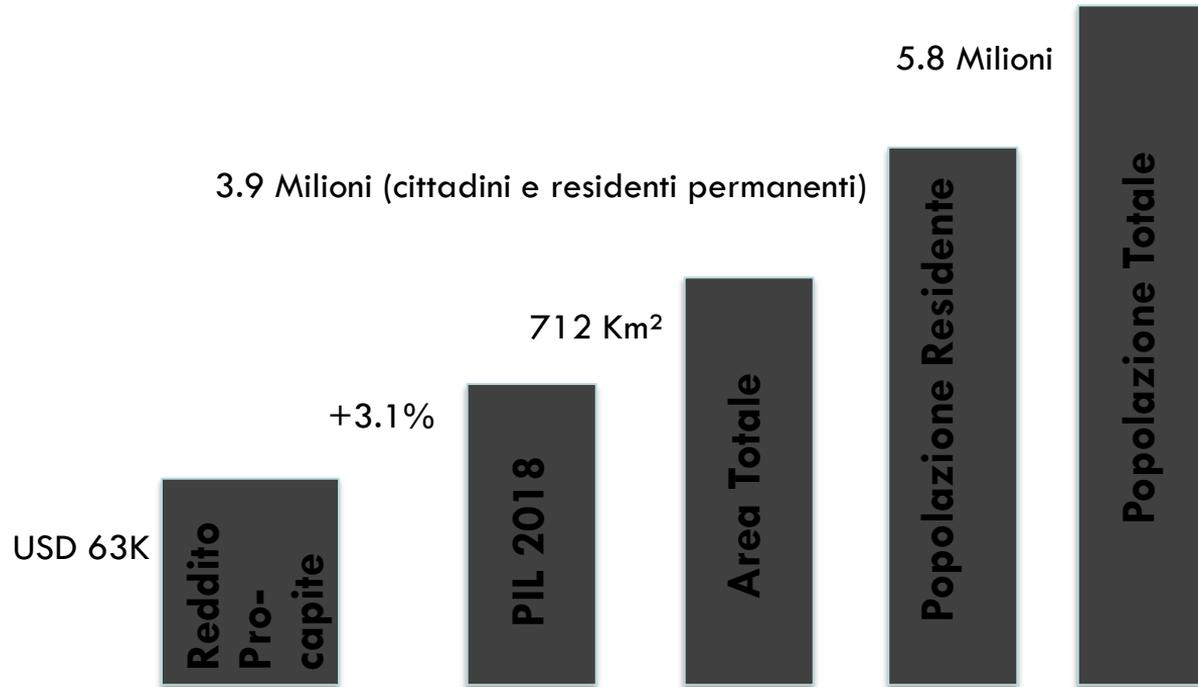
Oltre 350 aziende italiane in Asia per missioni commerciali e partecipazione a fiere ed eventi.

Collaborazioni ufficiali: SIMEST; CEIP; Promex; UBAE; Fiera Milano; Banco Popolare di Sondrio; UMFCCL; Farindustria, EDB.

I servizi offerti da ICCS

- Organizzazione Missioni Imprenditoriali
- B2B Meeting con:
 - Partner commerciali
 - Distributori
 - Investitori
- Temporary Export Manager
- Ricerche di mercato
- Sede legale
 - Domiciliazione di imprese
 - Representative Office
- Eventi promozionali

Dati paese



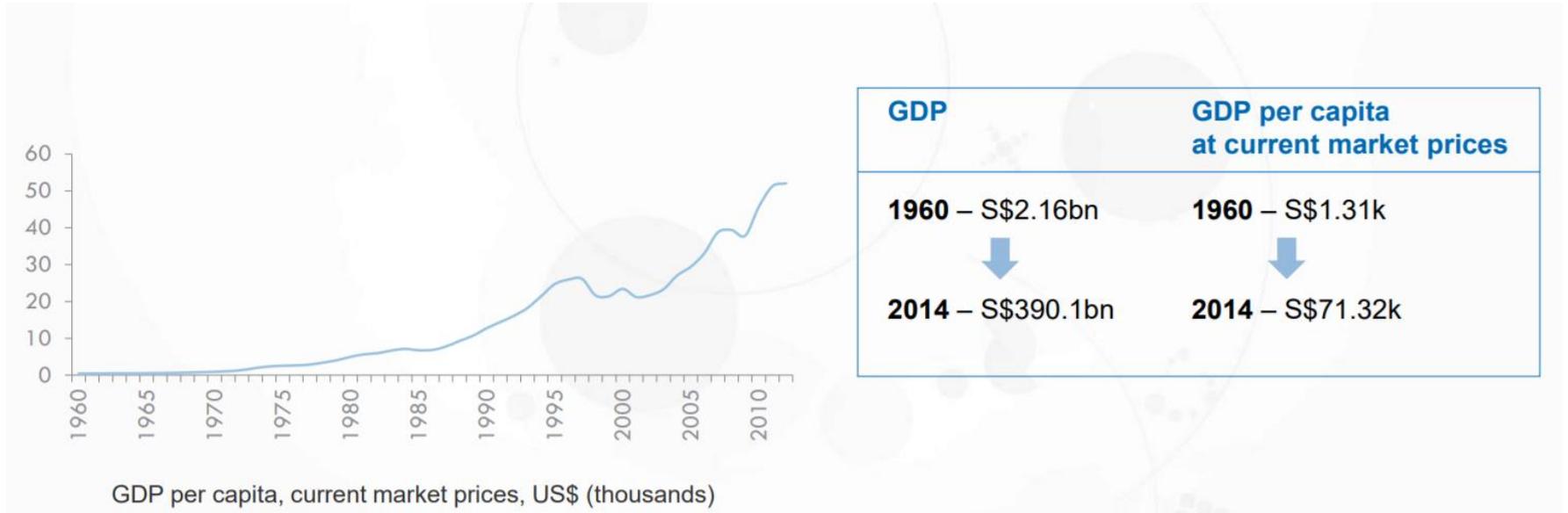
Singapore 1960



Singapore 2018



The economic transformation



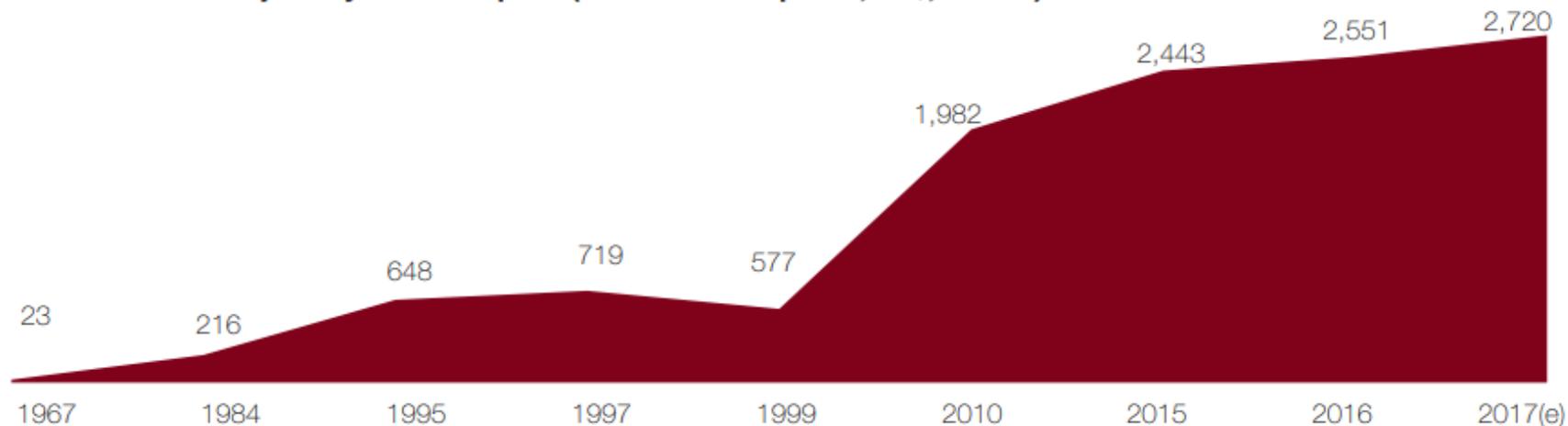
Geopolitics



ASEAN's timeline

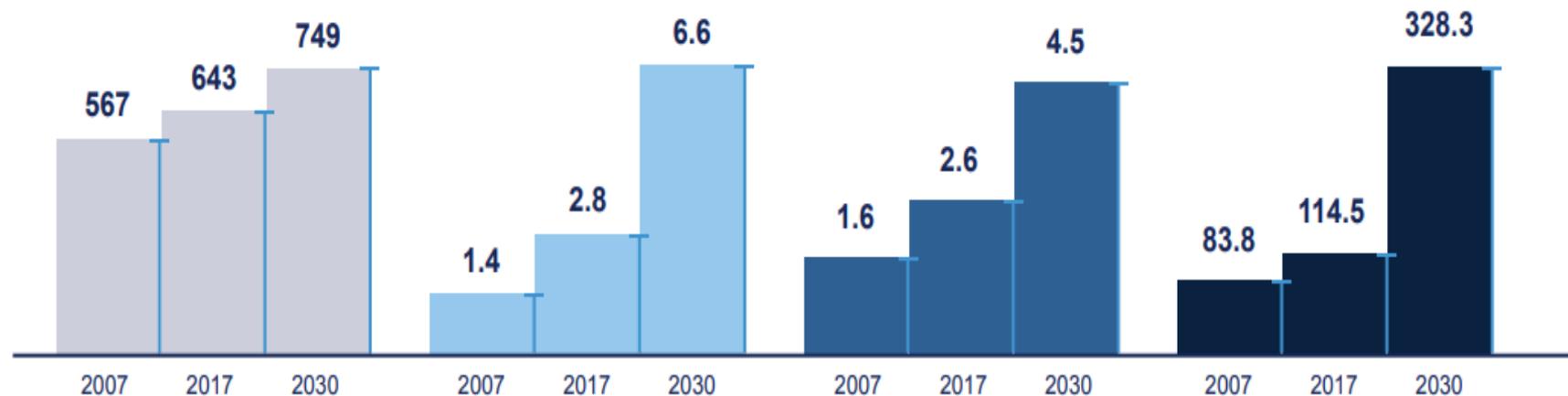


ASEAN's economic journey since inception (GDP at current prices, US\$, billions)



Source: ASEAN Secretariat, 2017; WEO Database, IMF, October 2017

ASEAN ECONOMIC PERFORMANCE



POPULATION
Million Persons



GDP
USD Trillion



TRADE
USD Trillion



FDI
USD Billion

Opportunita' Commerciali



I principali settori di interesse per le aziende italiane

Costruzioni

Arredamento

Agroalimentare

Medicale

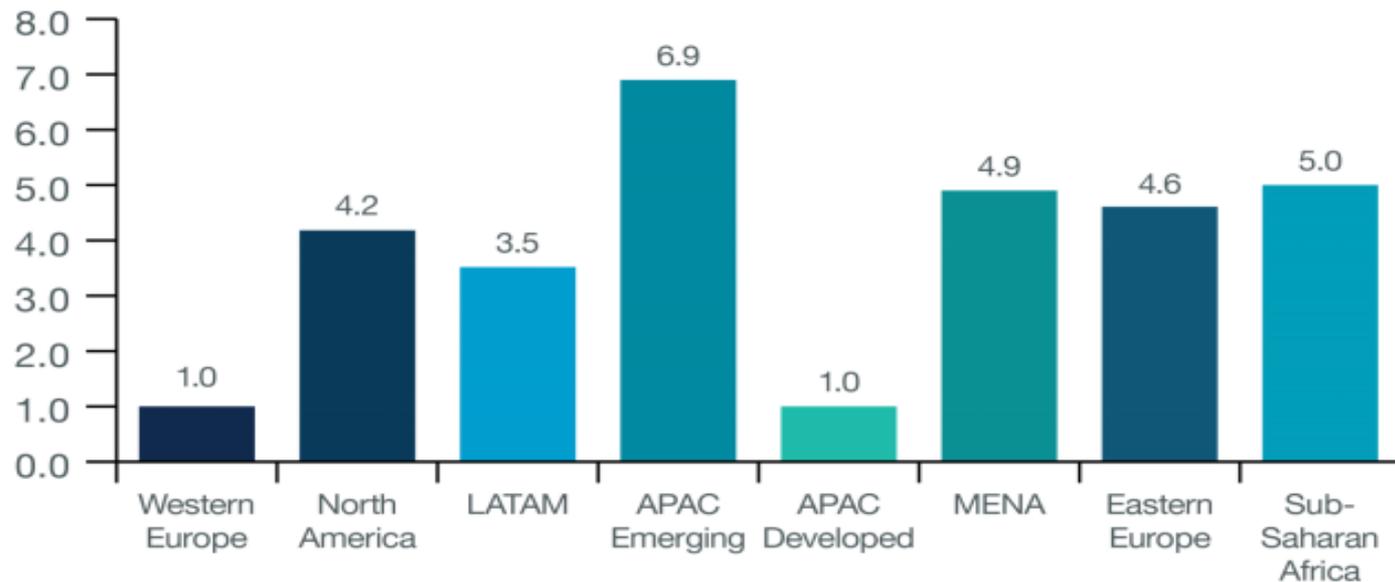
Innovazione

Costruzioni e Infrastrutture



Regional Construction Markets: 2012-2025 Growth Rates for Construction Output

■ % pa average growth rate



■ Source: Global Construction Perspectives and Oxford Economics

■ www.globalconstruction2025.com

© Global Construction Perspectives and Oxford Economics
OXFORD ECONOMICS

Construction Output 2012-25

■ % average annual growth rates

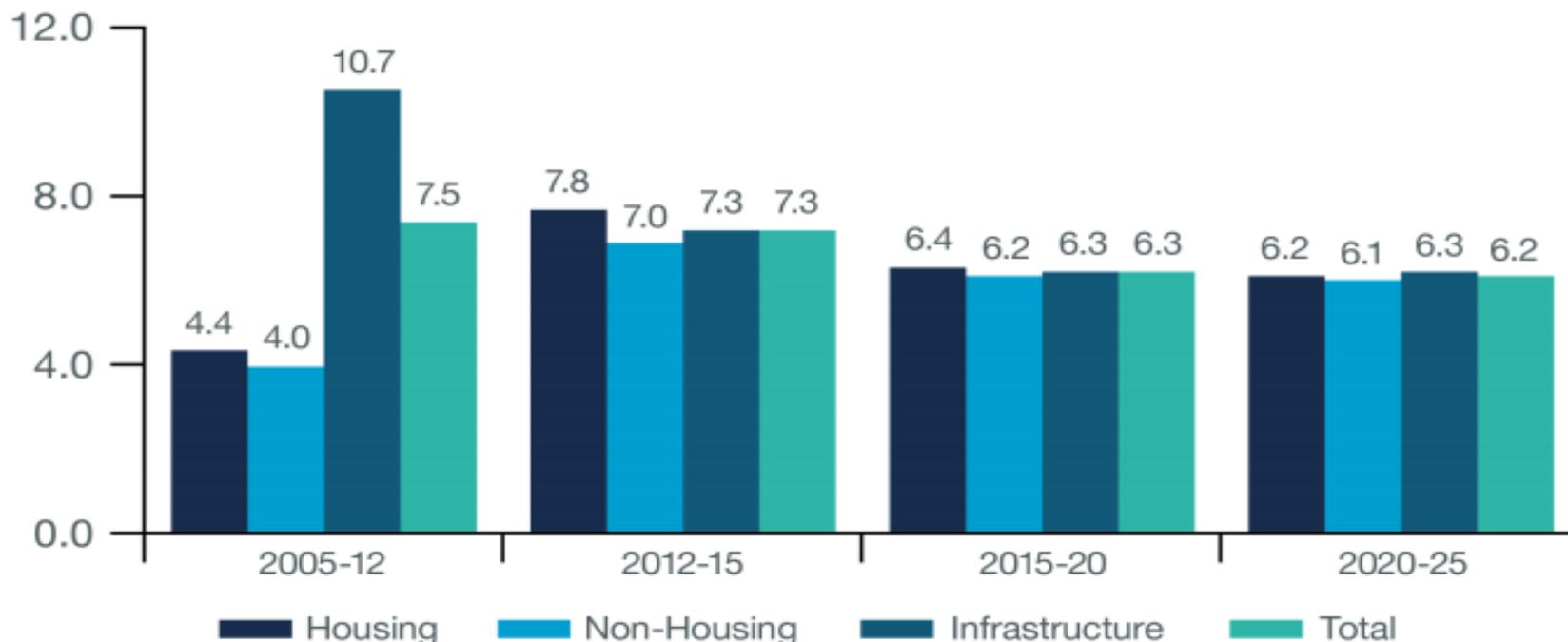
Average annual growth rates					
0-1%	1-2%	2-3%	3-4%	4-5%	5-6%
France	Australia	Czech Rep.	Algeria	Bulgaria	Libya
Germany	Belgium	Hungary	Argentina	Chile	Philippines
Greece	Brazil	Poland	Canada	Columbia	Russia
Italy	Netherlands	S. Korea	Hong Kong	Egypt	Turkey
Japan	Sweden	UK	Kuwait	Malayasia	
Spain			Romania	Mexico	
			Singapore	Morocco	
			Ukraine	Saudi Arabia	
				South Africa	
				Thailand	
				UAE	
				US	
6-7%	7-8%	8-9%	10-11%		
Indonesia	China	Nigeria	Qatar		
Vietnam	India				

■ Source: Global Construction Perspectives and Oxford Economics

■ www.globalconstruction2025.com

Indonesia becomes new Asian Tiger

■ % pa average growth rates, construction output 2005-25



■ Source: Global Construction Perspectives and Oxford Economics

■ www.globalconstruction2025.com

Average house completions 2012-25

13 countries

■Average number of annual house completions

2012-25 Average	
India	11,507,476
China	9,326,381
Indonesia	1,513,865
US	1,485,966
Nigeria	1,484,362
Brazil	1,389,872
Mexico	742,780
Russia	572,517
UK	220,046
Australia	194,148
Germany	186,499
Saudi Arabia	184,135
Poland	167,560

Infrastrutture

Nell'Area dell'Asia Pacific il settore delle infrastrutture crescerà dal 7% all' 8% ogni anno fino al 2025, per un valore totale di USD 5.36 trillioni, equivalente al 60% della crescita totale del settore a livello mondiale.

I motivi che stanno spingendo questo grande sviluppo sono dettati prevalentemente da:

- 1) Forte attività di interscambio commerciale tra I Paesi dell'Area + Cina e India
- 2) Crescita costante della popolazione urbana

Country	Urban Population (%)	Urban Population Growth (%)
Indonesia	51.4	2.7
India	31.7	2.4
China	51.8	3
Malaysia	73.4	2.6
Vietnam	31.7	3.1
Thailand	34.5	1.5
Philippines	49.1	2.2

Source: World Bank, 2014

Arredamento



1,977
COMPANIES



5
SECTORS

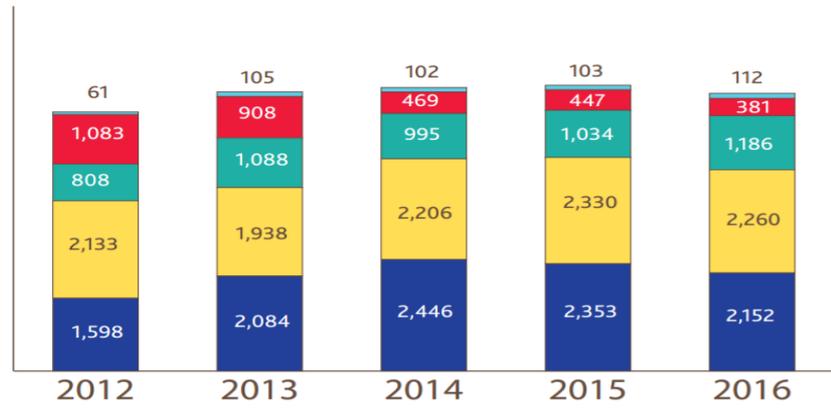
- Manufacturers
- Contract manufacturers
- Retailers
- Designers
- Supporting industries

GLOBAL FOOTPRINT

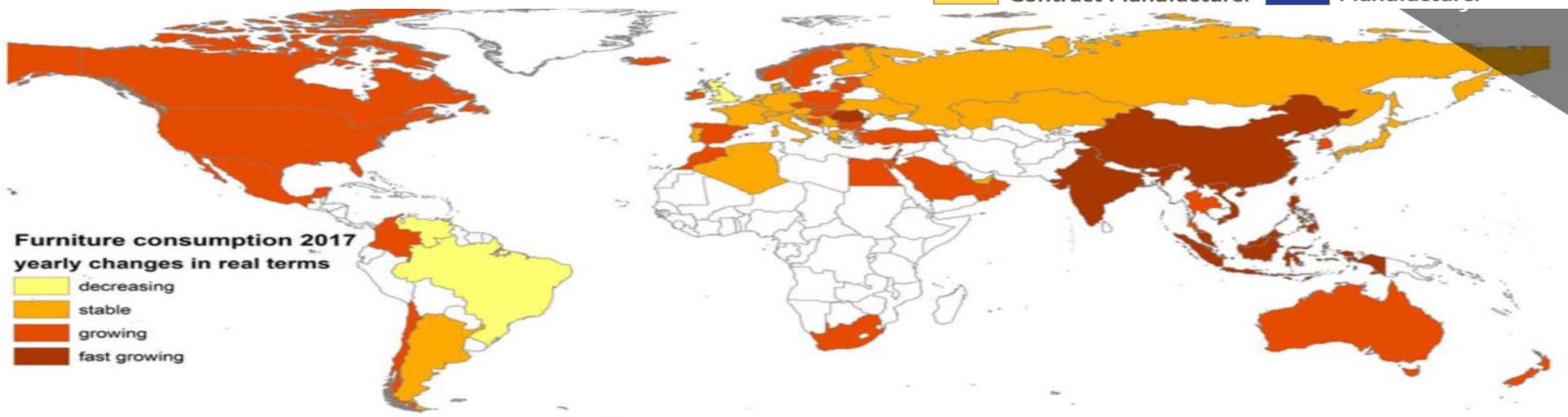
80
COUNTRIES



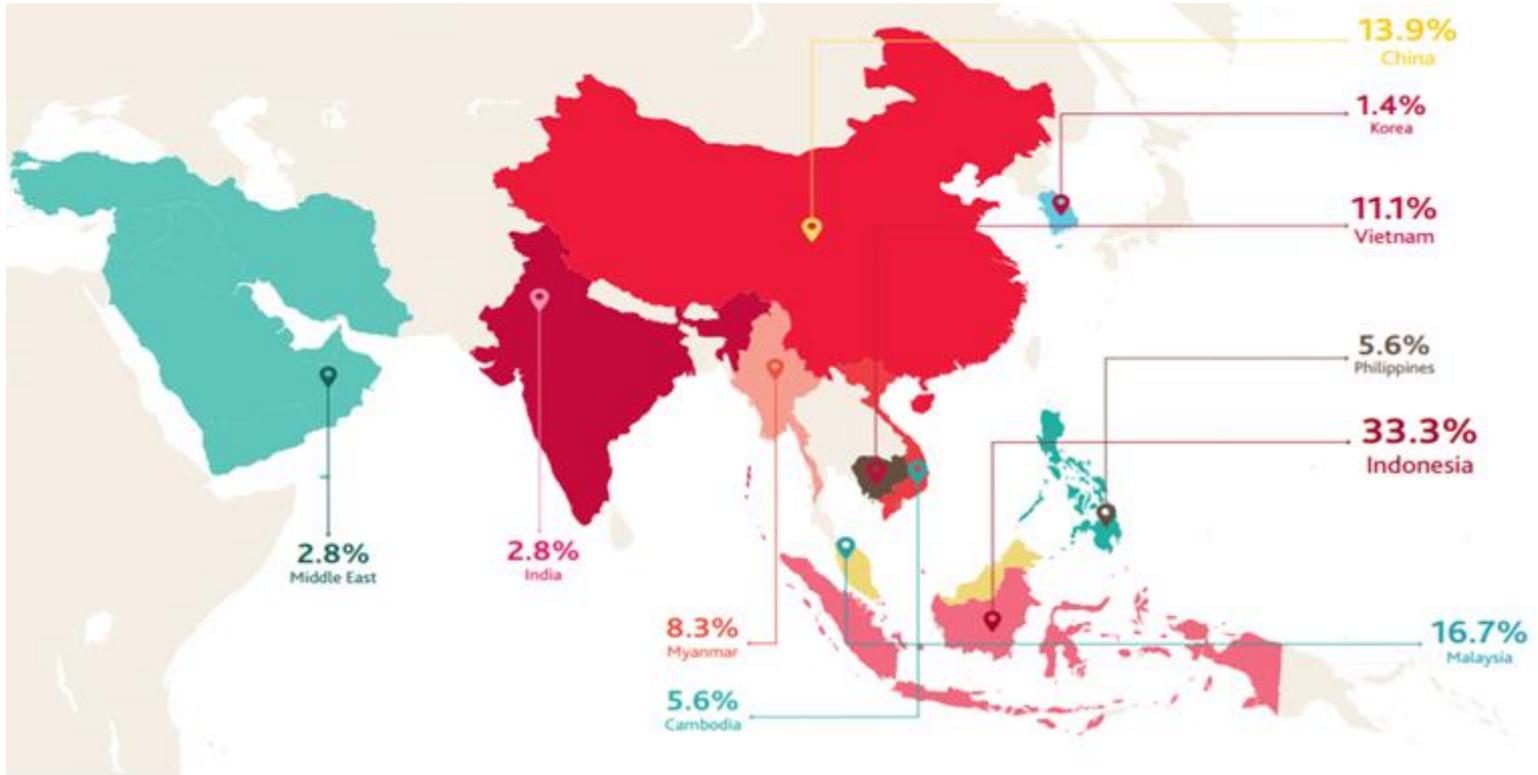
MARKET SHARE
\$6.27^B
(2015)



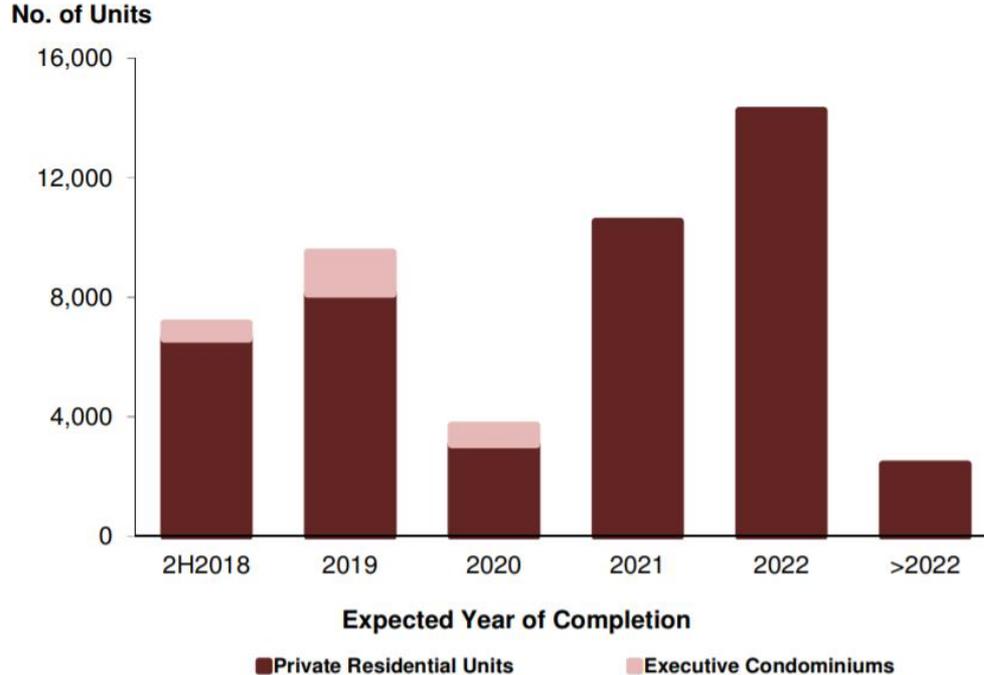
■ Designer
 ■ Wholesaler
 ■ Retailer
■ Contract Manufacturer
 ■ Manufacturer



Prossime espansioni



PIPELINE SUPPLY¹ OF PRIVATE RESIDENTIAL UNITS AND EXECUTIVE CONDOMINIUMS BY EXPECTED YEAR OF COMPLETION AS AT 2ND QUARTER 2018



Note: 3,304 private residential units and 3,626 executive condominiums were completed (i.e. obtained TOP) in 1H2018.

Expected Year of Completion	Private Residential Units	Executive Condominiums	Total Units²
2H2018	6,626	504	7,130
2019	8,124	1,386	9,510
2020	3,079	628	3,707
2021	10,532	-	10,532
2022	14,240	-	14,240
>2022	2,402	-	2,402
Total	45,003	2,518	47,521

1/ Pipeline supply figures as shown above refer to new development and redevelopment projects with planning approvals (i.e. Provisional Permission, Written Permission).

2/ As at the end of 2H2018, there were 26,961 unsold units with planning approval, up from 24,193 units as at the end of 1st Quarter 2018. In addition, there is a potential supply of 19,500 units (including ECs) from Government Land Sales (GLS) sites and awarded en-bloc sale sites that have not been granted planning approval yet. They comprise (a) about 8,400 units from awarded GLS sites and Confirmed List sites that have not been awarded yet, and (b) about 11,100 units from awarded en-bloc sale sites. A large part of this new supply of 19,500 units could be made available for sale later this year or next year, and will be completed from 2021 onwards.

Futuri progetti



Find Sale Sites +

Sale Site Information -



Print Map



Technical Details



Tender Results

Kampong Java Road

Land Use	Residential (Non-Landed)
Estimated Site Area (ha)	1.16
Gross Plot Ratio	2.8
Estimated Housing Units	435
Sales Agent	URA
Estimated Launch Date	Oct-18

Futuri progetti



Sale Site Information



Print Map



Technical Details



Tender Results

Sims Drive

Land Use	Residential (Non-Landed)
Estimated Site Area (ha)	1.62
Gross Plot Ratio	3.0
Estimated Housing Units	650
Sales Agent	URA
Estimated Launch Date	Nov-18

Modalita' di entrata nel mercato dell'arredamento e design

- Specifiche eseguite da Architetti e designer
- Collaborazioni con Aziende di costruzioni
- Retail

Food and Beverage



Agroalimentare a Singapore

- Valore Totale del Mercato: 3Mld SGD
- Numero di aziende del settore: 6.751
- Contribuzione al PIL: 0.8%
- Importazione: 90% del fabbisogno nazionale

Modalita' di entrata nel mercato agroalimentare

- Gourmet shops;
- Agenti;
- Ho.Re.Ca. (dettato dalla forte presenza turistica);
- Importatori;
- Distributori;
- GDO;
- Grocery Retail Chain;
- Ristoratori (molti fanno importazione diretta, a Singapore sono presenti oltre 150 ristorante italiani)

Medicale



Settore Medicale

Il tutta l'area ASEAN, 3 elementi stanno sostenendo la crescita del settore medicale:

- 1) Aumento del reddito medio;
- 2) Aumento della classe media;
- 3) Invecchiamento della popolazione

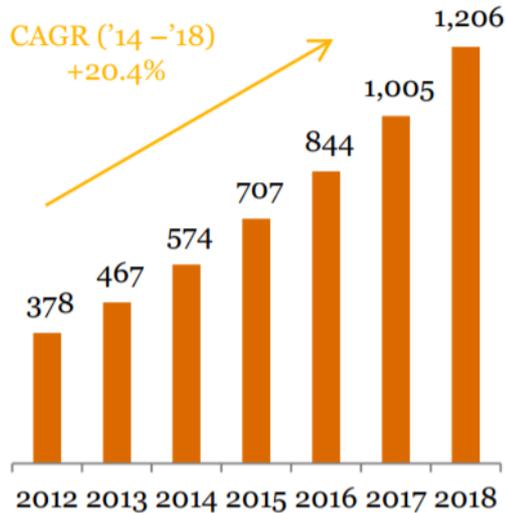
Il governo singaporiano prevede di aumentare di 3,700 I posti letto all'interno dei propri ospedali entro il 2020.

Il Turismo medicale ha un valore di oltre SGD 900 Mln / anno.

Revenue growth

Forecasts estimate over 20% growth in revenues for private hospitals in APAC up to 2018

Private hospital revenues APAC (2012-18) (US\$b)



Growing demand

It is estimated that 180m new hospital beds will be needed over the next decade to satisfy demand in APAC, with 40% expected to be fulfilled by private healthcare providers

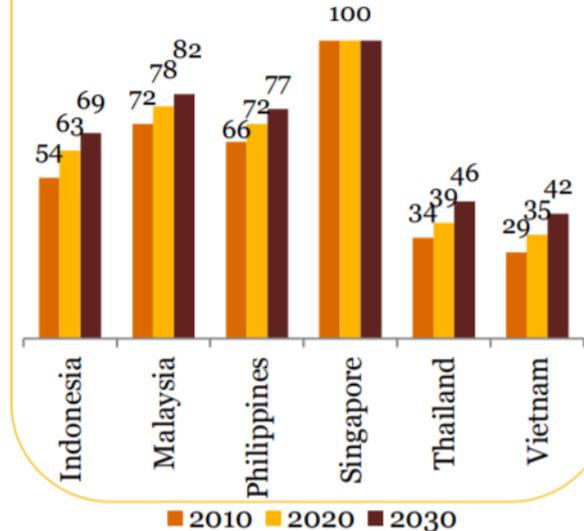
180m
new hospital beds



Rising urbanisation

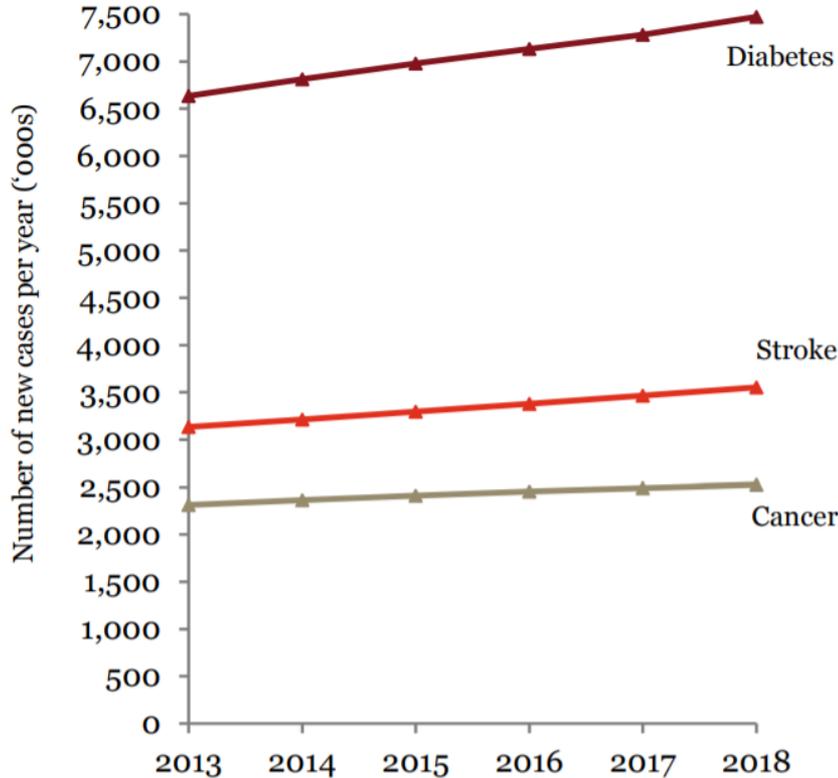
An influx of population into the cities, where most of the hospitals are concentrated, will increase demand for services

Urban population as a share of total population (%)

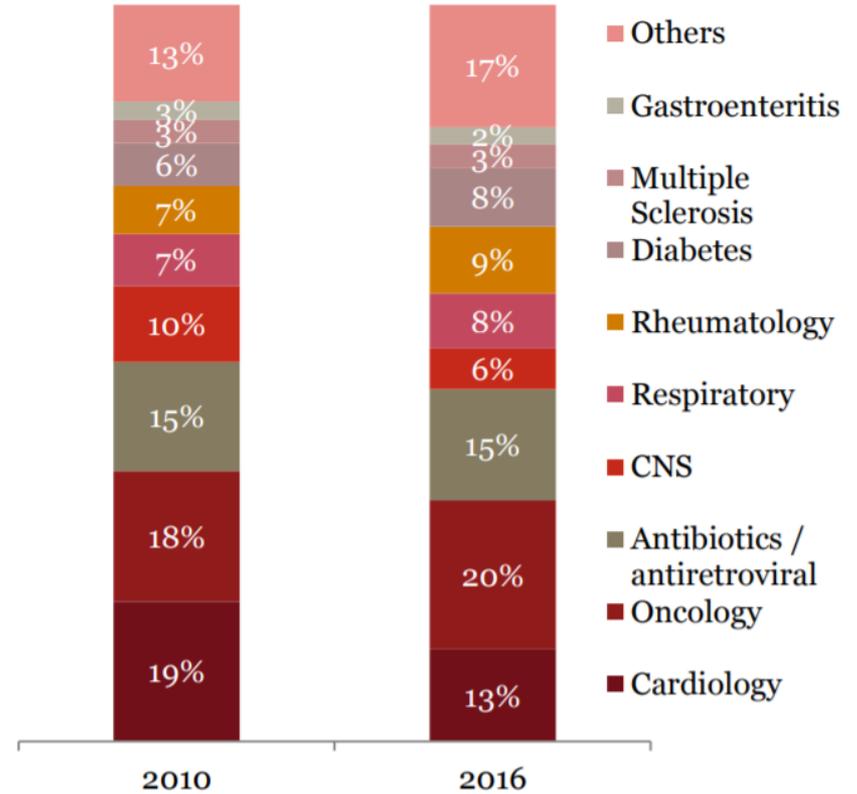


*source: Frost & Sullivan; The Guardian; PwC Analysis

Incidence of chronic diseases in Asia Pacific



SEA Therapeutic Category Breakdown (2010 and 2016)



Fiere ed Eventi 2020

Beauty Asia, partecipazione alla fiera cosmetica ed organizzazione incontri B2B (20-26 Febbraio 2020);

Builtech Asia, partecipazione alla fiera costruzioni ed organizzazione incontri B2B (11-13 Marzo 2020);

Study Tour per Architetti a Singapore e Jakarta (Maggio 2020);

Italian Food and Beverage in Singapore (giugno 2020);

Lifestyle Night (Settembre 2020);

Missione Commerciale multisetoriale a Singapore e Indonesia (Ottobre 2020)



BEAUTY ASIA2020

24TH EDITION

24 – 26 FEB 2020

11AM – 7PM

SUNTEC SINGAPORE

LEVEL 4 HALLS 401 – 403

TRADE AND PROFESSIONALS ONLY



NATURAL
INGREDIENTS

FACE & BODY
TREATMENT



MANICURE
& PEDICURE

HAIR CARE
& SALON



BuildTech Asia 2020

International Building & Technology Expo

11 - 13 March 2020 | Singapore EXPO

The Future of Construction - INTEGRATED,
COLLABORATIVE, PREDICTIVE and SMART!

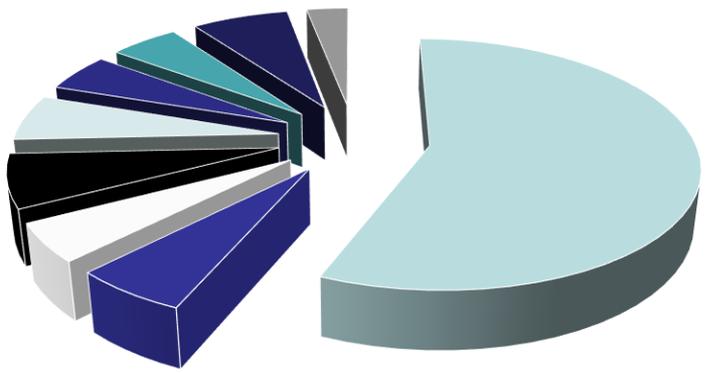


Italian Food and Wine in Singapore

Suntec City Convention Centre Singapore

Giugno 2020

Provenienza Buyers



- Singapore
- Malaysia
- Indonesia
- Thailandia
- Honk Kong
- Cina
- Giappone
- South korea
- India





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