

FairPriceGroup

Every Day, Made A Little Better



A FULL
Plate

A look at the nutritional
state of the nation



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FOREWORD

In this island nation that we call home, we are fortunate that the health and wellness of citizens is a priority in both the public and private sectors. For example, FairPrice Group and the Health Promotion Board recently partnered to link the FairPrice Group app and HPB's Healthy 365 app to reward customers for Healthier Choice purchases. Many in our ecosystem are also working hard to increase the availability and accessibility of healthier options for all in Singapore.

Sound government policy and constant united efforts by providers of food and daily essentials in the public and private sectors over the years have led to Singapore being recognised on a global stage for its health and wellness standards.

In 2023, bestselling author Dan Buettner categorised Singapore as a "Blue Zone", a region with a high concentration of centenarians, or 100-year-olds¹. Particularly, he noted how life expectancy in Singapore jumped over 20 years within a lifetime, an outcome the rest of the world envies, enabled by policies that have helped us shape a healthier living environment.

Yet we have the conviction that we can do even better. After all, as Singaporeans, striving to outdo ourselves is in our DNA!

At FairPrice Group (FPG), our mission is to keep daily essentials within reach for Singaporeans by providing quality, value for money, nutritious essentials that

power them through everyday life. We deliver on this by benchmarking the prices of household staples and ensuring supply resilience; even amidst a stubborn inflationary environment and geopolitical uncertainties.

As Singaporeans continue to mature as consumers, FPG wanted to gain a deeper understanding of their evolving needs, challenges, and food consumption decisions. We partnered with NielsenIQ to conduct an in-depth study of Singaporeans' attitudes towards nutrition, how recent economic uncertainty has had an impact on their food habits, and the kinds of strategies that average citizens are employing to keep their families happy, healthy, and well fed.

The results reflect the strong determination of our community, particularly young families, to provide themselves and their children with a solid foundation in life through proper nutrition. It highlights opportunities to firstly enhance Singaporeans' understanding of what constitutes a healthy meal, secondly support them in balancing nutrition, taste, and affordability, and thirdly improve access to convenient and wholesome food options.

Today, much of the population have their plates full juggling work, family, and the frenetic pace of life in Singapore. At FPG, even as the contours of access to food and nutrition evolve, our dedication



VIPUL CHAWLA
GROUP CEO,
FAIRPRICE GROUP

to food security and nutrition, especially for the most vulnerable among us, remains unchanged.

Together with the FairPrice Foundation, FPG's philanthropic arm, we are intensifying our commitment to the community, especially to those in need, to stay true to our social mission of keeping daily essentials within reach.

As a group, we are committed to exploring innovative solutions to help educate a generation of Singaporeans on the importance of nutrition in keeping up a healthy lifestyle. It is our hope that our fellow man from all walks of life can benefit from food that is healthy, nutrient-dense, but also convenient and accessible.

As a champion of nutrition, FPG hopes to make life a little better every day for all in Singapore; helping everyone we serve to Start Strong and Stay Strong.

¹<https://www.bluezones.com/2023/10/the-worlds-6th-blue-zones-region/>

MAKING EVERY DAY A LITTLE BETTER FOR ALL IN SINGAPORE

FairPrice Group and FairPrice Foundation's signature programmes that support nutrition.

CHEERS BREAKFAST CLUB

The Cheers Breakfast Club is a first-of-its-kind initiative aimed at providing Primary Six (P6) students with a strong head start for the final milestone of their Primary School life - the Primary School Leaving Examinations (PSLE). Through the initiative, FairPrice Foundation distributed **12,000 breakfast bundles** containing a variety of delicious and nutritious breakfast essentials to P6 students across **131 participating Cheers and FairPrice Xpress convenience stores** islandwide.



12,000 breakfast bundles distributed across **131** participating Cheers and FairPrice Xpress convenience stores

START STRONG STAY STRONG PROGRAMME

Start Strong Stay Strong is Singapore's first preschool nutrition and sustainability education initiative. Developed by FairPrice Foundation in partnership with Terra SG and My First Skool by NTUC First Campus with support from KK Women's and Children's Hospital, its focus is to bridge the gap in early nutrition education by engaging and empowering kids to make informed food choices that are better for their health, and the planet.



A FULL PLATE - SINGAPORE'S LARGEST FOOD DONATION DRIVE

A Full Plate is Singapore's largest food donation drive, organised by FairPrice Group with support from FairPrice Foundation to improve access to nutrition for the underprivileged by providing them with healthy grocery bundles and hot meals. By calling on all Singaporeans to donate and **matching donations up to \$1,000,000**, FairPrice Foundation aims to rally the community in support of each other, and elevate peoples' understanding of the important role that nutrition plays in daily life.



matching donations up to **\$1,000,000**

BLOCK PARTIES



The Community Block Party initiative, first launched during National Day 2023, has helped communities forge closer ties and deepen engagement with those in need by bringing together heartland residents in celebration of festive occasions. Since the initiative's launch, FairPrice Group has brought block parties to **14 neighbourhoods** and approximately **8,000 residents** across Singapore.

14 neighbourhoods
Approximately **8,000** residents

COMMUNITY FRIDGE RESTOCK INITIATIVE

First launched in 2023, the Community Fridge Restock Initiative enables FairPrice Group to reduce food waste, nourish the underprivileged, and engage the communities we operate in. Through the programme, approximately **one tonne** of rescued fresh fruits and vegetables from FairPrice stores is distributed for free to individuals and families in need across more than 20 touch points in Singapore every month. Over **18 tonnes** of fresh produce has gone towards nourishing the underprivileged since its launch.



over **18** tonnes of fresh produce has nourished those in need

MAY DAY DISCOUNTS

In celebration of May Day 2024, FairPrice Group committed to providing NTUC Union and Link members with more than **\$S4.5 million** worth of savings through deals and discounts on daily essentials. These included offers on staples like rice, oil, kopi and teh at Kopitiam outlets, and even non-food essentials such as laundry detergent.



More than **\$S4.5 mil** worth of savings through deals and discounts

KEY FINDINGS FROM A FULL PLATE

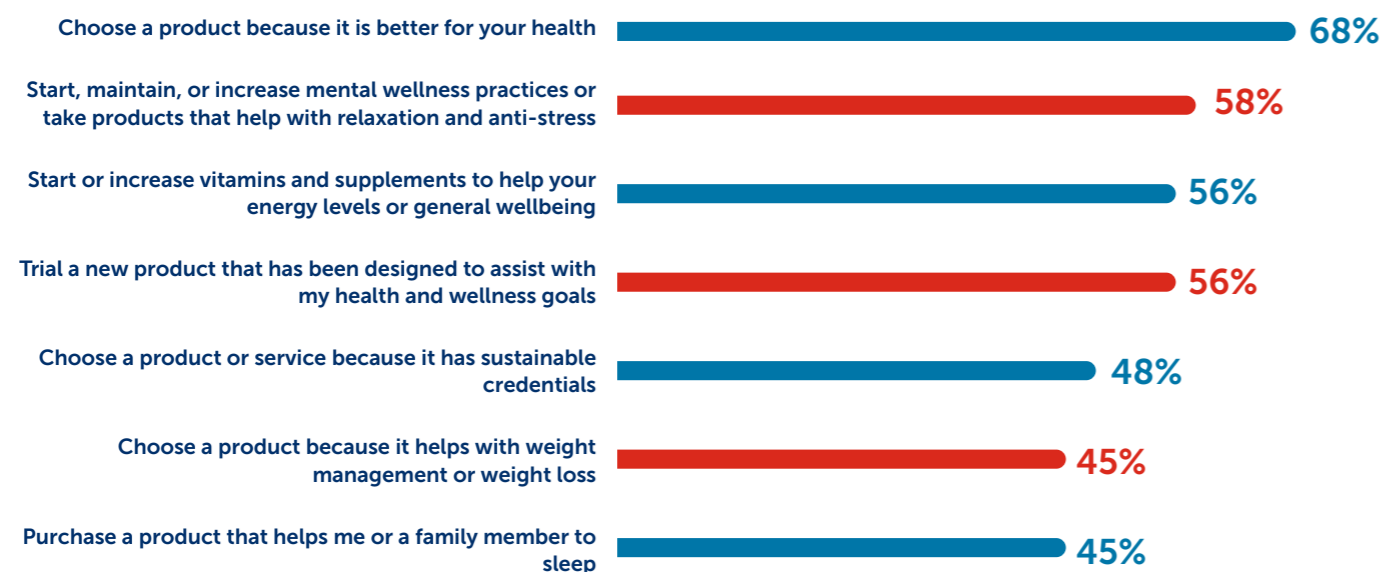
Singaporeans' attitudes regarding health and nutrition are a reflection of targeted, nation-wide initiatives and educational programmes aimed at making healthy, balanced living a priority.

Our study, conducted in the first quarter of 2024, sought to identify how these initiatives can be built upon to elevate Singaporeans' understanding of nutrition, improve how they access it in their daily lives, and empower them to start strong, and stay strong. Here are the three main findings:

1 SINGAPOREANS RECOGNISE A BALANCED MEAL IS KEY TO A HEALTHY DIET, BUT HAVE DIFFERING OPINIONS ON WHAT A BALANCED MEAL IS

Health and nutrition is very important to Singaporeans - 68% choose products based on whether they are better for their health, and 83% agree or strongly agree that a healthy meal is a balanced meal.

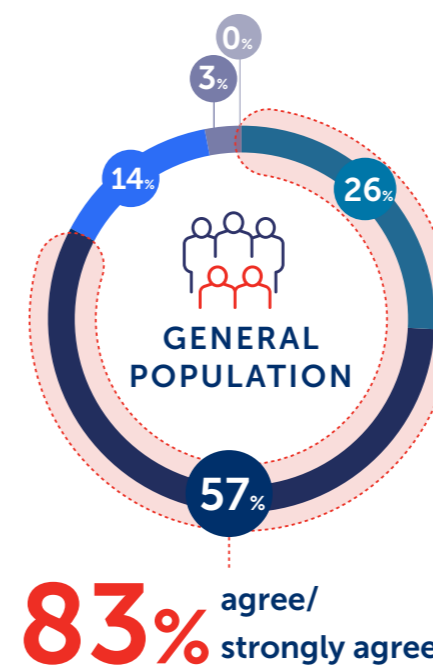
Drivers for consumer product choices²



²This data comes from NielsenIQ's Consumer Outlook 2024 report

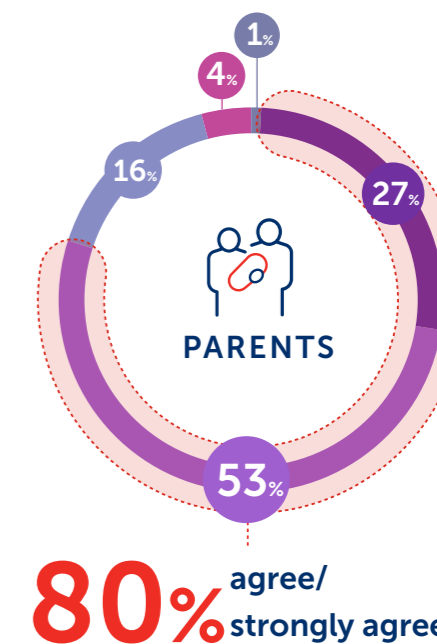


A healthy meal is a balanced meal*



Ensuring my children eat a nutritious diet / get enough nutrients is my biggest concern.*

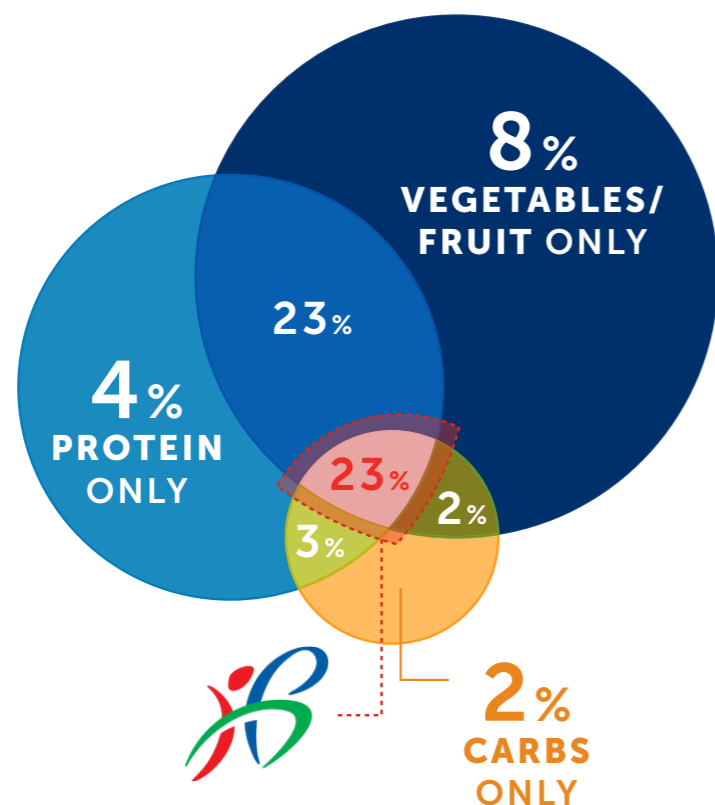
(Asked to parents)



*Respondents were given the following five options for this question: strongly agree, agree, neutral, disagree, and strongly disagree.

However, many respondents had differing opinions about what constitutes a balanced meal: **less than 1 in 4 understood** that it contains fruit/vegetables, protein (meat), and carbohydrates – the Health Promotion Board’s description of a healthy plate.³

What makes up a nutritious meal



PROTEIN (NET)	53%	FRUIT AND VEGETABLES (NET)	56%	CARBOHYDRATES (NET)	30%
Has meat	30%	Has vegetables	44%	Has rice/ noodles/ grain/ bread	18%
Has protein	23%	Has fruit	21%	Has carbohydrate	15%

23% MENTIONED PROTEIN + FRUIT/VEGETABLES + CARBOHYDRATES

Note: There are other responses that fall outside the three main food groups.

“A healthy meal usually includes a **balanced combination of essential macronutrients**, encompassing protein, carbohydrates, fats, vitamins, minerals, and fiber sourced from whole food options like fruits, vegetables, whole grains, lean proteins, and nutritious fats.”

– Quintile 1⁴, Young family with kids 7 – 12 years old

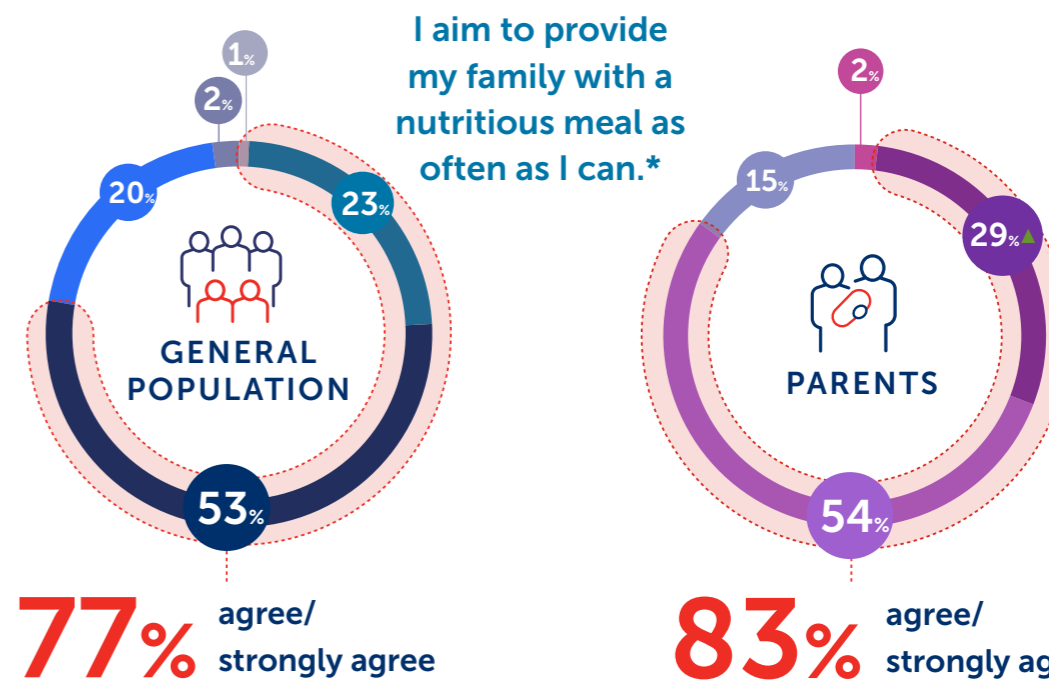
³ <https://www.healthhub.sg/programmes/nutrition-hub/eat-more>
⁴ Individuals with a household income of less than S\$2,000

Our study found that parents especially held the perception that nutrition is important, because it contains the “building blocks to grow the body, contributes to overall health, and is more crucial for developing kids to grow, compared to adults”⁵.

Indeed, 76% of parents agreed, or strongly agreed with the statement: “Ensuring my children eat a healthy instead of unhealthy diet is my biggest concern.”, and 83% agreed, or strongly agreed with the statement “I aim to provide my family with a nutritious meal as often as I can.”

Ensuring my children eat a healthy instead of unhealthy diet is my biggest concern.

76% of parents agree/ strongly agree



These findings suggest that Singaporeans, particularly parents with young children, are keenly aware of the importance and need for nutrition, but more can be done to inform them on how to provide nutrition to themselves and their families.

⁵ Insight derived from qualitative home interviews conducted as part of the study.
*Respondents were given the following five options for this question: strongly agree, agree, neutral, disagree, and strongly disagree.

2 PARENTS FIND IT CHALLENGING TO BALANCE NUTRITION AND SATISFYING KIDS' STOMACHS

A tension exists in parents' minds between the need to provide nutrition for their children and the need to satisfy their kids' desire for tasty and filling food – regardless of whether it meets perceived nutritional needs all of the time⁶. Put another way, while nutritious food is clearly important to parents, getting their children to eat

enough is just as important. Essentially, mealtimes are a negotiation of wills between what parents want their children to eat (nutrition) and what their children would willingly eat (taste).

Drilling down on this, parents say they aim for three key factors in meals –

taste, fullness, and key nutrients⁷. As many as 71% of parents said that taste "is the deciding factor on what makes a good meal", while 70% agreed, or strongly agreed, with the statement: "Getting my children to eat enough food/not be picky is my biggest concern."

Taste is the deciding factor on what makes a good meal.

71% of parents agree/strongly agree

Getting my children to eat enough food / not be picky is my biggest concern.

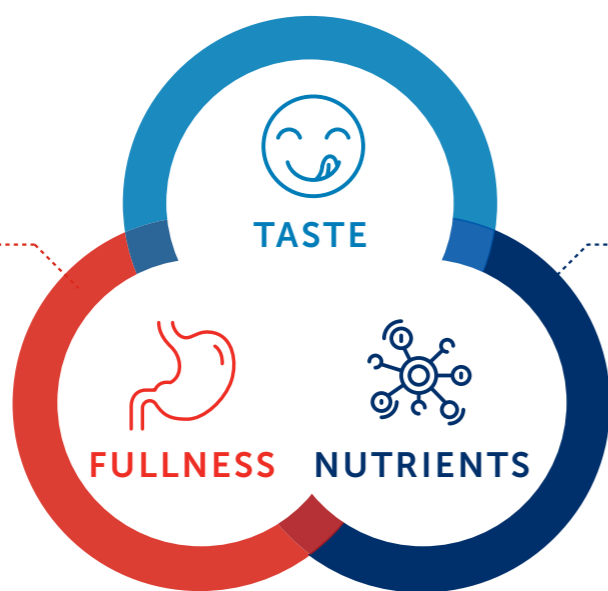
70% of parents agree/strongly agree

Ensuring my children eat a healthy instead of unhealthy diet is my biggest concern.

76% of parents agree/strongly agree

Providing my children with enough to eat is my biggest concern.

71% of parents agree/strongly agree



Ensuring my children eat a nutritious diet / get enough nutrients is my biggest concern.

80% of parents agree/strongly agree

Taste is a key priority for a number of reasons. One, it makes it "easier" at mealtimes with kids because it entices them to finish meals⁸. Two, parents like to continue using brands that they grew up with as they believe familiarity guarantees enjoyable taste⁹; and lastly, parents want to provide their kids with food that they will like (such as frozen processed nuggets, sausages, fries) so that they finish their meal without causing a fuss¹⁰.

Regardless of income, parents give their children processed foods in four out of the 10 meals that they prepare in a week.

“ Even if some are unhealthy, it's okay as long as they've had other healthier meals. Meals are planned around making sure kids eat it and eat it fast... ”

– Quintile 2¹¹, Young family with kids 7 – 12 years old

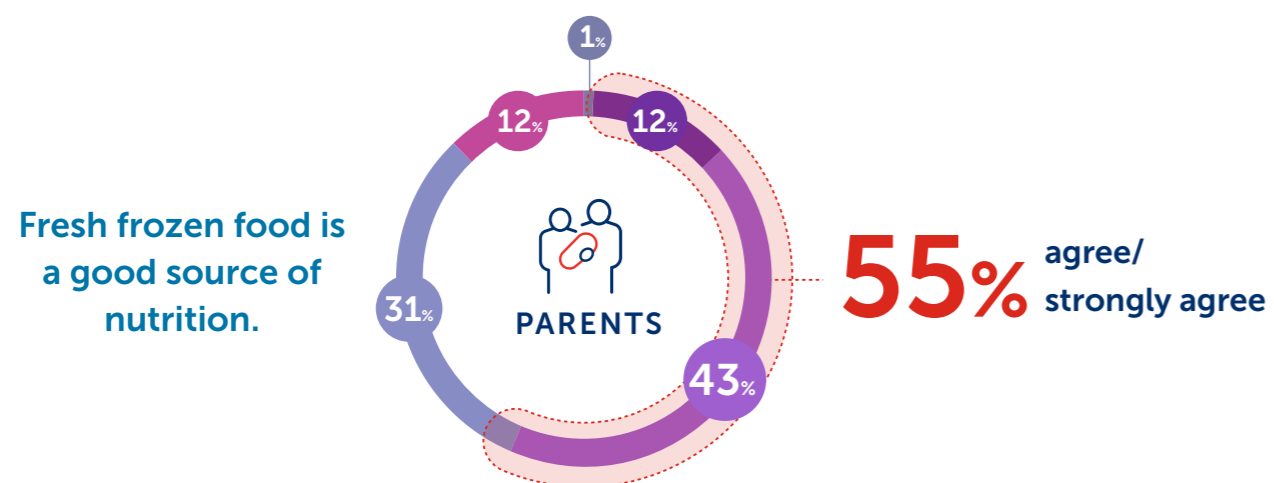


^{6,7,8,9,10} Insight derived from qualitative home interviews conducted as part of the study.
 ¹¹ Refers to individuals with a household income of between S\$2,000 to S\$5,999.
 ¹² Insights derived from qualitative home interviews conducted as part of the study.

3 FRESH FROZEN FOOD IS INCREASINGLY VIEWED AS A GOOD SOURCE OF NUTRITION

Study findings also suggest that Singaporeans today have less misconceptions surrounding the nutritional value of fresh frozen food. More than half of parents surveyed agreed that fresh frozen food¹³ is a good source for nutrition - a perception validated by academic studies¹⁴.

More than **5 in 10** parents agreed that fresh frozen food is a good source of nutrition.



This perception may be driving increased consumption of fresh frozen food - 52% of parents said they had increased such consumption in the past year.

My consumption of **fresh frozen food** has increased in the past year

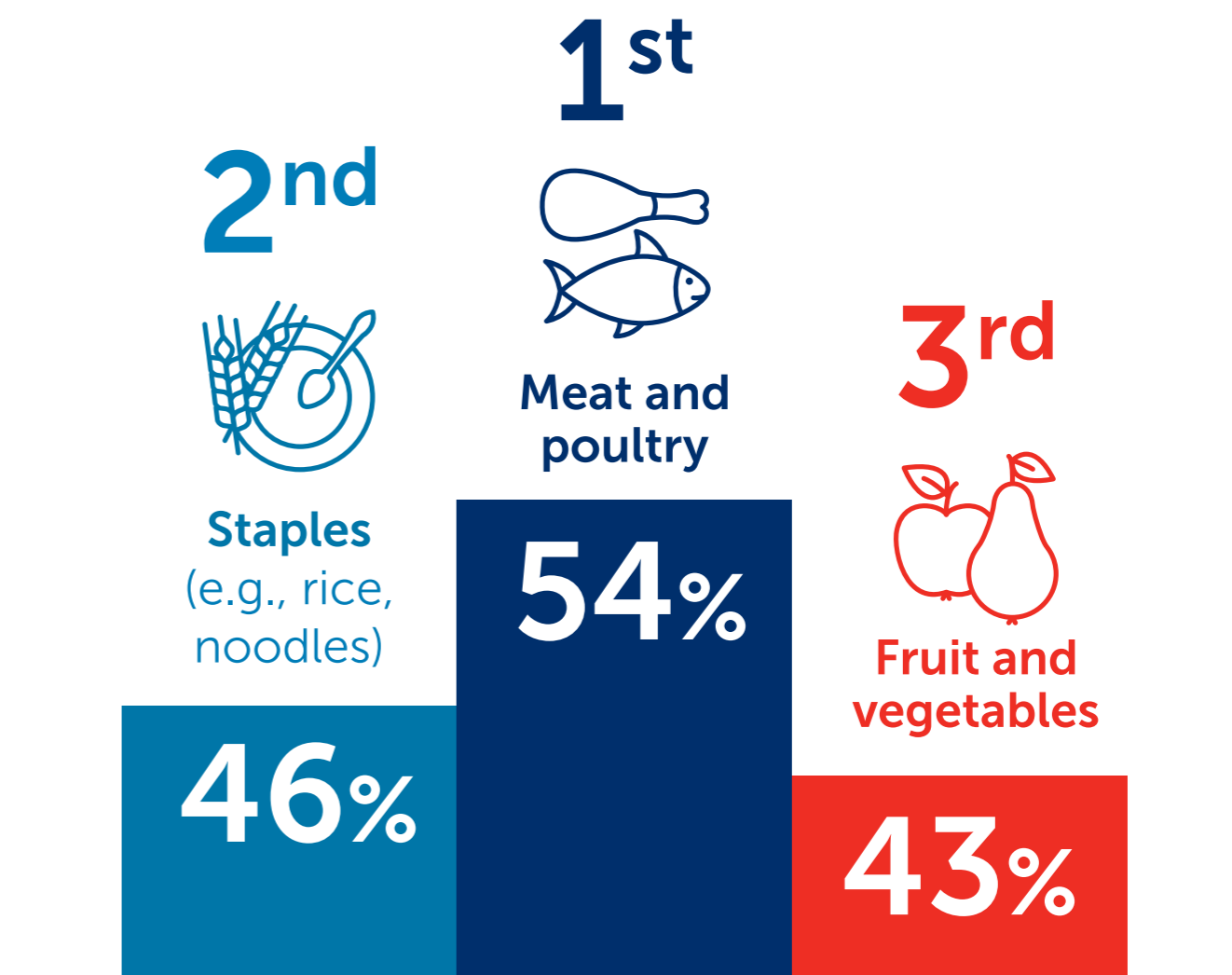


¹³ Food that has been frozen immediately after harvest, when nutrients are the most abundant.

¹⁴ <https://www.sciencedirect.com/science/article/abs/pii/S0889157517300418>

Beneficiaries of food donation programmes that were surveyed indicated a preference for protein, staples, fruits and vegetables over processed canned foods.

Top 3 items parents who are beneficiaries of food donation programmes prefer to receive



THE OPPORTUNITY FOR FAIRPRICE GROUP

While the findings from this study indicate that Singaporeans are on the right track with prioritising health and nutrition, it also highlights areas where more can be done across the food continuum, especially by providers of food and daily essentials like FairPrice Group, to support consumers on this journey.

Guided by these key insights, we will focus our upcoming consumer support initiatives on the following areas:

1. Providing new impetus to elevating access to food and nutrition for all in Singapore.

In addition to deepening our own efforts in the foreseeable future to keep daily essentials within reach, we will also prioritise rallying our entire stakeholder spectrum - from suppliers, to community partners, to customers - in support of those in need, through programmes focused on charitable giving.

In late September 2024, we launched the Cheers Breakfast Club, an initiative built around the belief that every child, no matter the income group or background, should be empowered to start the day strong, especially during the Primary School Leaving Examinations season. Through the programme, 12,000 breakfast bundles filled with a mix of breakfast bars, protein, cereal and milk were given away to Primary 6 students across the island on the weekend just before their exams started.



2. Incorporating nutrition education into our overarching business strategy, and customer engagement.

Our study highlights a gap with regards to what Singaporeans think constitutes a balanced meal. To tackle this issue, we will implement a bottom-up approach aimed at educating all age groups, starting from the preschool level, on the importance of nutrition in daily life, and cultivating healthy eating habits.

In late September 2024, FairPrice Foundation launched Singapore's first

preschool nutrition education initiative - Start Strong, Stay Strong. Through the programme, by end-2025, more than 20,000 preschool kids will learn about the benefits of good nutrition and the importance of food circularity in an active and engaging way, through a curriculum specially curated in partnership with My First Skool by NTUC First Campus with support from KK Women's and Children's Hospital.

The programme was designed to meet the growing need for preschool nutrition education in Singapore, and is focused on giving every child a strong head start with making choices that are both good for their health, and the planet.

3. Ensuring that nutritious food is readily available through our programmes, initiatives, and food formats across the business.

Our study indicates that Singaporeans experience real tension when making the choice between nutrition and taste or fullness. In addition to our efforts to educate consumers on how there can be a natural intersection between these priorities, we will also commit to expanding our efforts to make nutritious food available and accessible to those in need through our community programmes, initiatives, and business formats.

From October to November 2024, FairPrice Foundation is encouraging Singaporeans to support their neighbours in need through A Full Plate, a FairPrice Group programme

supported by FairPrice Foundation, and the largest food donation drive in Singapore. Proceeds will go towards providing the beneficiaries of 10 charity partners with nutritious food and staples, and the Foundation will match donations up to S\$1 million.

To further ensure more families have access to the nutrition they need, FairPrice Foundation introduced a new initiative to support CHAS Orange card holders. Starting October 2024 and continuing through March 2025, CHAS Orange card holders will enjoy a 3% discount on all purchases every Friday at any FairPrice store. This discount applies to households with a monthly

income per person between S\$1,501 and S\$2,300. To redeem the discount, customers simply need to present their CHAS Orange card at the checkout counter.

This initiative expands FPG's commitment to providing affordable daily essentials to the community. It complements existing discount schemes available to the Pioneer Generation, Merdeka Generation, seniors, and CHAS Blue card holders (with a monthly income per person of S\$1,500 and below). FPG also offers regular promotions and weekly deals to ensure everyday essentials remain affordable for all shoppers.



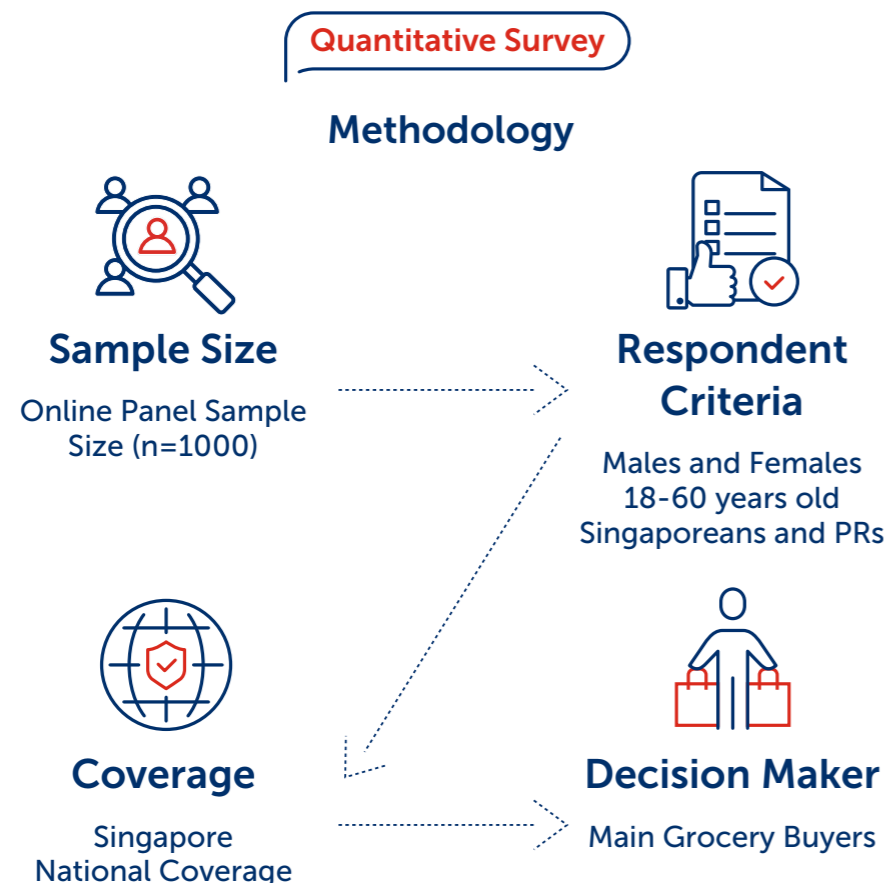
CONCLUSION

As a social enterprise, our mission for over five decades has been to keep daily essentials within reach for all in Singapore. Why we exist has not changed, but what we do and how we serve has transformed over the years - what essentials means to Singaporeans has evolved, and keeping them within reach today means more than

providing people with groceries and daily staples; it means leveraging innovation to make things easy on the wallet and easy on the experience for our customers across our ecosystem. This is how we will continue to elevate the way we serve our customers across the food continuum - upholding the

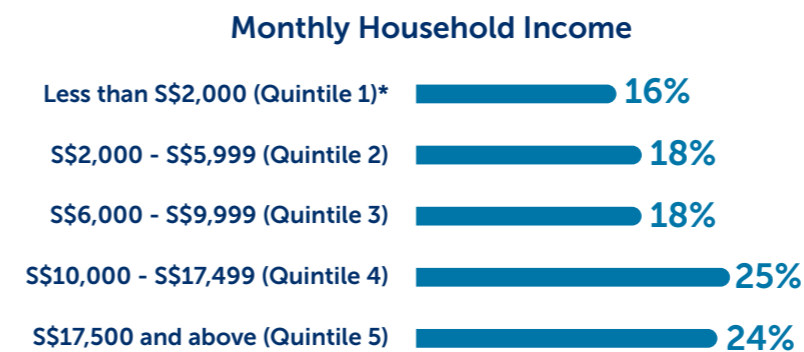
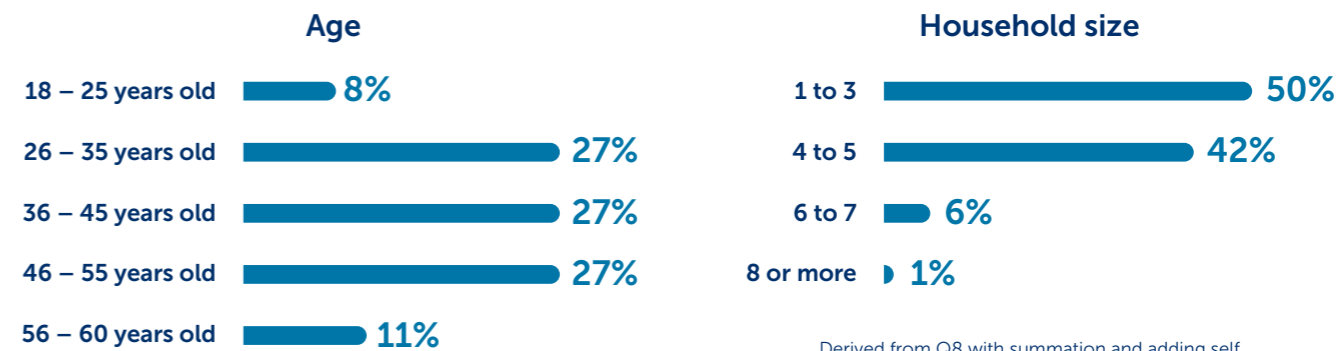
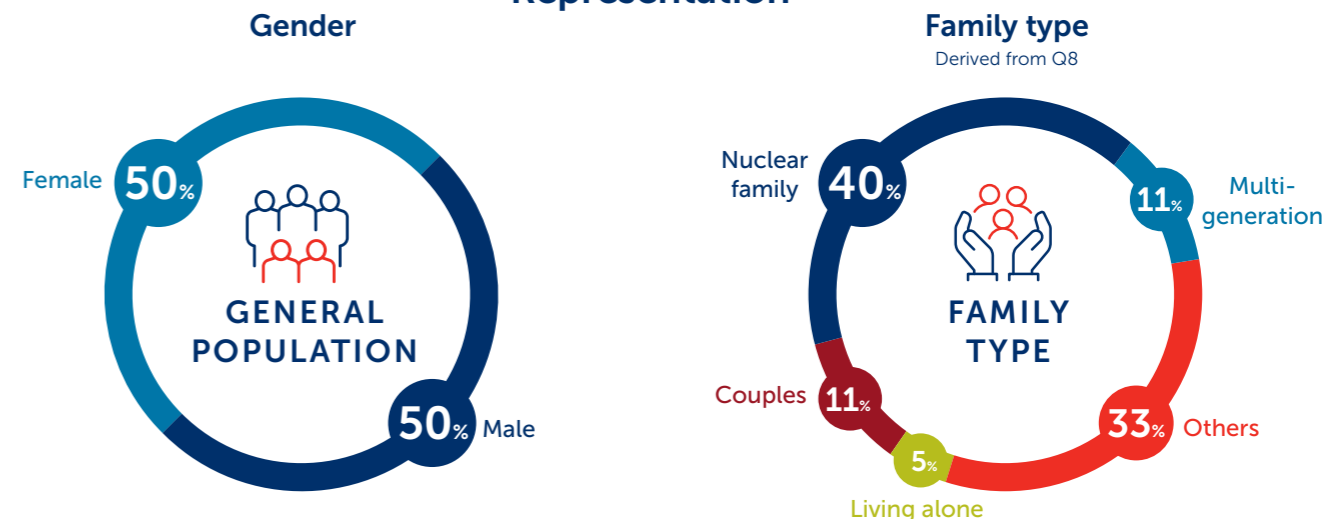
fundamentals that remain relevant to us, but not letting the past constrain our ability to shape a future together with all in Singapore, where we can make lives a little better every day, one full plate at a time.

RESEARCH METHODOLOGY AND SCOPE



FIELDWORK PERIOD: April 2024

General Population Representation



*Including households with no income

Base: Main sample (n=1000)
Ref: Q3: Please indicate your gender. Q5: Please indicate your age in years. Q8: How many people are there in your household, excluding yourself? Please indicate for each type. Please exclude domestic helpers, visitors and boarders. Q13: Please indicate your total monthly household income. Please indicate in SGD and round off to the nearest whole number. Please take into account the income of all the members of the household from all sources such as salary, wages, business profit plus any other sources of income such as rent, dividend / interest from your investments.

Qualitative Home Interviews

Methodology	In-home visits (90 min)
Sample	N=24
Other Sampling Criteria	<ul style="list-style-type: none">• Good mix of gender• Good mix of ethnicity to reflect general population• 30 - 55 y.o.• Main decision / shared decision maker of cooked and uncooked food• Most often visited channel for groceries (uncooked food) must be Fairprice

Ref: Q8: How many people are there in your household, excluding yourself? Please indicate for each type. Please exclude domestic helpers, visitors and boarders. Q13: Please indicate your total monthly household income. Please indicate in SGD and round off to the nearest whole number. Please take into account the income of all the members of the household from all sources such as salary, wages, business profit plus any other sources of income such as rent, dividend / interest from your investments.