



Singapore Food Story 2: Setting Hand to Plough Once Again

Jose Ma. Luis Montesclaros



RSIS Commentary is a platform to provide timely and, where appropriate, policy-relevant commentary and analysis of topical and contemporary issues. The authors' views are their own and do not represent the official position of the S. Rajaratnam School of International Studies (RSIS), NTU. These commentaries may be reproduced with prior permission from RSIS and due credit to the author(s) and RSIS. Please email to Editor RSIS Commentary at RSISPublications@ntu.edu.sg.

Singapore Food Story 2: Setting Hand to Plough Once Again

By Jose Ma. Luis Montesclaros

SYNOPSIS

Singapore Food Story 2 represents a step forward in improving the clarity of its food self-sufficiency goals compared to its predecessor strategies. But the push for clarity will need to be sustained in the long term, while shifting focus to improving farming profitability.

COMMENTARY

As the year draws to a close, it is timely to reflect on the latest developments in Singapore's approach to food security. On 4 November 2025, the hand was once again set to the plough, with the announcement of "[Singapore Food Story 2](#)", marking another transition point in the city-state's food security strategy leading up to 2035.

A familiar dictum in management is that one cannot manage what one cannot measure. This dictum is relevant to Singapore's self-sufficiency targets in domestic food production, with the refreshed strategy presenting a step forward in clarifying such targets. Still, to avoid loose ends, we need solid follow-through on public reporting at the commodity level to engender better public and private collaboration in achieving food self-sufficiency targets.

The Benefit of Clarity in Setting Commodity-Specific Targets

Singapore's strategies for achieving food security have evolved over the past decade from the 2013 Singapore Food Security (SFS) Roadmap to the "30-by-30 goal" in 2019, and today's Singapore Food Story 2.

A consistent element across these strategies has been the prioritisation of self-sufficiency targets for domestic production to meet domestic consumption, which serves as a buffer against disruptions in international trade, alongside the strategy of diversifying Singapore's import sources.

Where these strategies differed was in clarity on self-sufficiency targets at the commodity level. The benefit of setting specific commodity-based targets is evident from the relative success of the earlier 2013 SFS Roadmap. Targets were set for leafy vegetables (10 per cent, up from a 7 per cent baseline in 2010), eggs (30 per cent, up from 22 per cent), and fish (15 per cent, up from 4 per cent).

By 2018, a clear trend of progress and improvement was evident, with 13 per cent self-sufficiency in leafy vegetables (double the 2010 baseline), 24 per cent in eggs (above the baseline), and 9 per cent in fish (double the baseline).

30-by-30 Goal: Lack of Target Clarity

By contrast, no commodity-specific production targets were set in the 2019 30-by-30 goal. Instead, the framing of self-sufficiency was broadened to a 30 per cent “nutritional self-sufficiency” target, with the remaining 70 per cent to be imported.

On one hand, this framing considered the diverse nutritional needs of the population rather than the quantity of commodities to be produced, thereby better capturing food security concerns. However, the nutrition-based framing of self-sufficiency made the requirements less concrete and specific than the previous commodity-quantity targets measured in tonnage of eggs, vegetables, and fish. It was not clarified which nutrients the food authority was prioritising, in terms of caloric, mineral, or vitamin content.

Given the complexity and ambiguity of the 30-by-30 goal, no baseline level nor progress updates on national nutritional self-sufficiency were ever published while the strategy was in place. In fact, the Singapore Food Agency's (SFA) [reports](#) reflected commodity-based self-sufficiency in tonnage, even if the national strategy now required nutrition-based reporting.

While productivity has [increased](#) among recipients of productivity-enhancement grants in their pursuit of the 30-by-30 goal, the overall outcome is harder to assess today in the absence of published statistics on national nutrition self-sufficiency.

Singapore Food Story 2: The Need for Greater Clarity

Today, there is somewhat greater clarity with [Singapore Food Story 2](#), which has slightly more defined targets for two *commodity groups* – fibres and proteins – that are sub-components of the previous national nutritional self-sufficiency goal. By 2035, the city-state will be 20 per cent self-sufficient in fibres (including commodities like fresh leafy and fruited vegetables, beansprouts, and mushrooms) and 30 per cent in proteins (including eggs and seafood). Another improvement is that the baseline levels are now [published](#): 8 per cent for fibres and 26 per cent for proteins, as of 2024.

Yet the risk remains that Singapore Food Story 2's targets will not be seen as hard targets but only as aspirations. This was, in fact, the predicament of the 30-by-30 "goal" which was initially considered a "[target](#)" but, in the interim before the announcement of Singapore Food Story 2, was seen only as an "[aspiration](#)".

If the new strategy is to be credible, we need to provide further clarity by breaking down the targets for the fibre and protein commodity groups into more specific commodity targets. This would require annual reporting on target achievement at the commodity level, enabling earlier guidance when gaps arise. Doing so would also help set accountabilities across the private and public sectors, enabling timely strategic adjustments to achieve the 2035 fibre and protein self-sufficiency targets.

Addressing the Challenges to Profitability: Leafy Vegetables

By providing clear commodity-specific targets, the government will be able to provide more targeted investment to address the unique bottlenecks each commodity faces.

An underlying issue to address, previously observed at the commodity level, is the profitability challenge facing farming. For leafy vegetables, the previous focus was on improving productivity in terms of tonnage of food produced per hectare, given the limited land available. Focused R&D grants for technologies that boost productivity allowed for a [10 per cent productivity growth](#) in vegetable farming from 2019 to 2024.

The SFA also provided additional land and facilities through tenders to enable the adoption of indoor-farm technologies, which can enhance productivity manifold through controlled growing environments and the ability to grow on multiple layers within vertical farms.

The irony was that despite greater availability of land, facilities, and technologies, the city-state saw its leafy vegetable farmers [postpone](#) expansion plans, scale down operations, and, in the worst cases, shut down farms. This discrepancy highlights a key challenge: getting private-sector farmers on board in ways that are profitable for them as well.

A [2019 report](#) by the S. Rajaratnam School of International Studies (RSIS) identified a potential root cause: property tax on indoor farm facilities could affect the farmers' profitability and, in turn, their expansion decisions. Property tax exemptions are common among Singapore's strategic manufacturing industries, but they do not apply to upstream farm production.

Using the UrbanAgInvest tool (©NTU), the report found that about [two-thirds of total investment costs](#) in indoor farms are from fixed machinery, such as growing racks, temperature controls, smart LED lighting, and automation. As a result, farmers using indoor farm machinery would be assessed at much higher property taxes than farmers who do not adopt such technologies. Thus, the property tax disincentivised farm owners from leveraging technologies to expand their production.

Plug-and-Play Tenanted Spaces?

Under the Singapore Food Story 2, a solution to the property taxation cost issue is the initiative being explored today to provide “plug-and-play tenanted spaces” for farmers to do indoor vertical farming. Essentially, this would allow farmers to avoid paying such taxes, as they do not own the spaces.

But this raises the question: What rental rate would enable an expansion of domestic production of leafy vegetables while also providing sufficient tax revenues? In the decade to come, the realisation of Singapore’s refreshed food security strategy will hinge critically on how it pivots to create conducive incentive mechanisms that address the profitability challenges faced by each of its key commodities under fibre and protein groups, while balancing these with the city-state’s broader economic requirements.

Jose Ma. Luis Montesclaros is a Research Fellow and the Food Security Lead at the Centre for Non-Traditional Security Studies (NTS Centre), S. Rajaratnam School of International Studies (RSIS), Nanyang Technological University (NTU), Singapore.

S. Rajaratnam School of International Studies, NTU Singapore
Block S4, Level B3, 50 Nanyang Avenue, Singapore 639798

Please share this publication with your friends. They can subscribe to RSIS publications by scanning the QR Code below.

