



GAOYAN · PULSE · 2026-W37

W37 **2026**

Cost Transmission, Format Divergence and Compliance Gates

From 7–11 September, public evidence across nine Asian markets converged on three operating threads: Japan's October wheat price creates a 12% upstream step; Singapore's total foodservice market weakened while fast food grew; and institutional-kitchen licensing and traceability moved compliance into the operating foreground. This edition consolidates four daily briefs, 11 valid candidates and 68 unique public URLs.

Cost transmission

Format divergence

Kitchen compliance

Value menus

07—11 SEP

Coverage

4 / 5

Daily briefs

9 / 9

Fixed markets

68

Unique sources

Five metrics and six operating threads

Upstream numbers define pressure; format and customer economics determine action.

Japan government wheat price

+12.0%

Weighted five-variety step; not restaurant cost.

Singapore F&B volume

-3.3%

July YoY; nominal sales -1.9%.

Singapore fast-food volume

+2.8%

Cafés fell 7.3% in the same month.

Indonesia kitchens without SLHS registration

1,999

Temporarily closed; not incident count.

Unique public sources

68

Deduplicated across four briefs.

Six weekly threads

WEEKLY THREADS

- 01

Costs do not transmit mechanically

Government price → mill → purchase → recipe → menu → traffic and margin.
- 02

Market totals hide format divergence

Fast-food growth coexisted with café and food-court weakness.
- 03

Licensing becomes an operating gate

Registration, assessment, certification, remediation and reopening form a funnel.
- 04

Value pressure reshapes occasions

Thai survey signals cheaper choices, home cooking, fewer meals and less delivery.
- 05

Traceability reaches menu operations

Japan beef labels and Chinese Taipei herb sampling require batch and ownership controls.
- 06

Policy still needs commercial proof

Customers, SKUs, orders, margin and repeat remain the common gap.

Twelve tiered signals

Eleven valid candidates were deduplicated; the same policy or survey is not repackaged.

01	Japan government wheat price +12% JPY62,520→70,020 per tonne; downstream pass-through pending.	Strong
02	Singapore F&B volume -3.3% Industry total; not same-store, traffic or profit.	Strong
03	Singapore fast-food volume +2.8% Diverged from cafés -7.3% and food courts -8.8%.	Strong
04	Indonesia temporarily closed 1,999 kitchens SLHS registration gap equals about 7.4% of the checked base.	Strong
05	Thailand value-pressure poll 941 self-reports; 64.82% shifted to cheaper or discounted food.	Strong
06	Hong Kong moves fresh-food clearance to 24 hours From 1 October; not purchasing volume or prices.	Strong
07	Korea's K-food chain becomes more specific Localisation, certification, logistics, contract farming and menus.	Medium
08	Japan requires correction for 632 beef dishes Individual-ID display and double-check controls.	Medium
09	Tainan high-risk sampling: 12 of 38 failed Risk sample cannot represent the market rate.	Medium
10	Thailand takes 20 firms to India for co-development An MOU is not a SKU, order or sale.	Medium
11	Korea promotes 4,765 products Maximum 64% discount is not average discount or sales.	Watch
12	Thai overseas restaurants framed as demand nodes Three visits do not prove market size or orders.	Watch

Six institutional nodes to track

Institutions explain price, formats, licences, consumers and supply chains.

01

Japan MAFF

Sets the October government wheat price and the upstream step across high-frequency foods.

+12.0% Period-on-period **JPY70,020** Per tonne

02

Singapore DOS

Provides nominal, volume, online-share and five-format measures.

-3.3% Total volume **+2.8%** Fast food

03

Indonesia BGN

Turns SLHS registration into a gate for continued kitchen operation.

1,999 Temporary closures **27,022** Checked base

04

Thailand DoH

Splits cost pressure across cheaper food, home cooking, meals and delivery.

941 Respondents **25.71%** Less delivery

05

Hong Kong CFS

Extends clearance time; arrivals and purchasing outcomes still need proof.

24h From October **16h** Previous window

06

Chinese Taipei local health

High-risk sampling moves coriander and basil traceability into procurement.

38 Samples **12** Non-compliant

Eight trends and evidence strength

Mature operating problems and early commercial signals need different windows.

01	Cost-transmission chain	Purchase, recipe, portion, menu, margin	S
02	Format-level prioritisation	Fast food, cafés, food courts, restaurants	S
03	Institutional licence operations	Registration, certification, remediation, reopening	S
04	Traceability loop	Batch, label, owner and reinspection	S
05	Value menus and solo occasions	Cheaper choices, home cooking and delivery	A
06	24-hour fresh-food clearance	Time flexibility to purchasing outcomes	A
07	Cross-border co-development	Ingredients, formulation, certification, importer	A
08	Policy-to-commerce conversion	Customer, order, margin and repeat	B

Evidence mix

Strong 6 · Medium 4 · Watch 2



Six numbers: what they mean—and do not mean

Prices, indices, kitchen counts and survey shares do not automatically become restaurant demand or results.

+12.0%**Japan government wheat price**

Is: weighted five-variety step.

Is not: restaurant purchase or menu increase.

Japan MAFF

-3.3%**Singapore F&B volume**

Is: July industry total YoY.

Is not: same-store, traffic or profit.

Singapore DOS

+2.8%**Singapore fast-food volume**

Is: format-level YoY.

Is not: every brand growing.

Singapore DOS

1,999**Indonesia temporary closures**

Is: kitchens without SLHS registration.

Is not: incidents or permanent closures.

Indonesia BGN

64.82%**Thai cheaper-food response**

Is: self-reported result among 941.

Is not: national population or orders.

Thailand DoH

68**Unique public sources**

Is: URLs across four daily briefs.

Is not: 68 independent growth stories.

GAOYAN audit

Upstream signal



Customer cost



Recipe / menu



Traffic / order



Margin / repeat

Nine-market and five-day source audit

W37 uses four daily briefs dated 8–11 September. The missing 7 September brief is disclosed; the minimum three-day gate is met.

4/5	9/9	11	68
Complete dailies	Fixed markets	Valid candidates	Unique URLs

Indonesia

Candidate · kitchen licence

Malaysia

Searched · no strong update

Singapore

Candidate · format economics

Philippines

Searched · inflation context

Thailand

Candidate · value pressure

Chinese Taipei

Candidate · herb sampling

Japan

Candidate · wheat / traceability

Korea

Candidate · K-food chain

Hong Kong

Candidate · 24h clearance

sourceCompleteness=complete

Four daily files match index.json and have complete status; fixed-market failures are zero; BI was not used. The 7 September gap reduces continuity but does not trigger the fewer-than-three-days publication block.

Next checks and executive brief

01**Japan**

Obtain post-October mill quotes, chain purchase prices, menus, portions, traffic, sales and margin.

02**Singapore**

Bridge fast-food growth and café/food-court weakness to brands, outlets, orders, tickets and profit.

03**Indonesia**

Track registration, certification, remediation, reopening, meals and resumed purchasing for 1,999 kitchens.

04**Thailand**

Validate survey methods and compare with delivery orders, tickets, discount cost and repeat.

05**Hong Kong / Chinese Taipei / Japan**

Track operational use, reinspection and outcomes after clearance, sampling and label actions.

06**UFS / Ajinomoto**

Continue monitoring products, customers, prices, channels, capacity, orders and repeat in Korea and Southeast Asia.

EXECUTIVE BRIEF

The 12% is upstream—not a menu-price instruction

Japan's October wheat-price step is clear, but the commercial chain still runs through mill quotations, operator purchasing, recipes, portions, menus, traffic and margin.

Singapore's July data reinforce segmentation: total foodservice volume fell 3.3% while fast food rose 2.8%. Indonesia's 1,999 temporary kitchen closures reveal a certification-process gap, not an incident rate.

Primary sources

Japan MAFF; Singapore DOS; Indonesia BGN; Thailand Department of Health; Hong Kong CFS; Chinese Taipei local health; Korea MAFRA. Full links are in the review site and audit.