



*Know-how for Horticulture™*

**Product to business –  
the changing face of  
Hong Kong as a  
market for Australian  
fresh and processed  
vegetables**

S Favero, et al  
Ausveg

Project Number: VG00098

## **VG00098**

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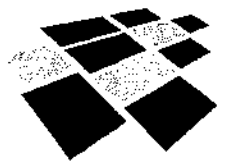
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**Horticulture Australia**

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for Australian fresh and processed vegetables**

**Project VG00098  
Report**

**Report prepared by**

**Silvio Favero, chairman, Ausveg  
Brian Newman, executive officer, Ausveg  
Jonathan Eccles, senior program manager, Horticulture Australia Ltd**

**May 2001**

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### **Executive Summary:**

In May 2001, a small group representing the Australian vegetable and potato industry national peak body – Ausveg – travelled to Hong Kong to attend the HOFEX 2001 trade exhibition, participate in the 4<sup>th</sup> Asia Fruit Congress and to make observations and contacts that would contribute to the development of further trade in Australian fresh and processed vegetables into the region.

The overwhelming impression from the visit is that the full impact of globalisation is now evident in the Hong Kong market. Leading retailers made it clear that they can obtain their inventory of fresh and processed fruit and vegetable products from a wide variety of high quality, consistent suppliers.

The differentiation between suppliers is no longer in the quality of their produce but is their ability to meet the business requirements of the importing company.

Australia is recognised as having the ability to produce significant quantities of high quality, safe and wholesome vegetable products. However, it was stated on numerous occasions that Australian producers “must get their act together”. Leading retailers would like to do more business with Australia but are no longer willing to deal with a large number of individual businesses competing with one another for a small share of the market.

There is significant opportunity for innovation in value adding products, packaging, presentation and product support. But to ensure importer interest in the product on offer the Australian exporter must be able to present a fully developed business plan complete with background research and development, a program of product support and a demonstrated ability to provide quality produce, consistently, in the required quantities and time frames and at a competitive price.

In short, the Australian vegetable industry is acknowledged to have the capacity to produce. It has not yet developed the capacity to work cooperatively to provide business based solutions to importers of fresh and processed product in Hong Kong.

The available ‘window of opportunity’ for the Australian vegetable industry to change its focus from ‘the product’ to ‘the business’ is contracting rapidly. We have the capability but have yet to find the collective commitment.

## **Recommendations:**

As a consequence of the information gained from this visit, the following recommendations are made to the Ausveg Board as a means of implementing aspects of the Vegetable Industry Strategic Development Plan:

### **1 IMAGE ENHANCEMENT**

*It is recommended that Ausveg as the national peak industry body seek to actively encourage and facilitate a cohesive national image for the Australian vegetable industry in international markets through.....*

- *Participation in the "Australia Fresh" program and presenting fresh vegetables as a part of the Australian display at future HOFEX and Food Asia trade exhibitions in Hong Kong and Singapore.*
- *Ausveg, as a participant in the "Australia Fresh" program encourage the utilisation of the new "Australia Fresh" packaging for export market produce.*
- *Ausveg take advantage of opportunities in trade media such as Asia Fruit magazine to highlight positive aspects of the Australian vegetable industry on a regular basis.*

### **2 BUSINESS DEVELOPMENT**

*In order to respond to the clear need for industry assistance in the area of business planning it is recommended that Ausveg.....*

- *Organise further national Export Development Workshops with a focus on a national business planning approach*
- *In association with state members of Ausveg, explore ways to assist growers/exporters to develop a cohesive Australian business planned approach to key markets for key products*
- *In association with state members implement a program to establish grower/exporter cell groups in each major region and to encourage these groups to form state export hubs that are capable of cooperating nationally to achieve critical mass in terms of product and business support.*

### **3 MARKET DEVELOPMENT**

*In order to better resource the export development strategy.....*

- *Ausveg, through the Vegetable R&D program, consider the appointment of 3 Market Development Officers (MDO's) – 1 Vic/SA/Tas; 1 NSW/Qld; 1 WA/NT, to work in cooperation with IDO's to actively assist with export market development strategies in each state.*
- *Ausveg should take the lead in facilitating the development of vegetable production and marketing alliances between potential southern hemisphere partners such as New Zealand, South Africa and Chile.*

### **4 NICHE MARKETS**

*Commission a project to....*

- *Evaluate niche market opportunities for Australian vegetable products in key Asian markets*

### **5 PACKAGING & PRESENTATION**

*Commission a series of projects to .....*

- *Seek innovative methods to differentiate and add value to Australian vegetables in export markets through innovative packaging and presentation methods*
- *Develop consumer friendly produce packaging that will enhance the value of fresh produce at the very top end of the market in key markets such as Hong Kong and Singapore.*

## **6 CONVERSION OF COMMODITIES TO PRODUCTS**

*It was a clear objective of the major Hong Kong retail chains to seek ways to convert commodity (bulk lines) of produce to 'unique' products. This is a response to clear market segmentation in these markets and offers an opportunity for Ausveg to .....*

- *Commission research into innovative methods of converting commodities into products and by such transformation add value to the produce from the top end of the market which is developing rapidly in Hong Kong.*

## **7 GLOBAL RESPONSE PROJECTS**

*Through a more focused approach to R&D investment in export market development, Ausveg could respond to the effects of globalisation by....*

- *Commission a project to document economic and business advantages to southern hemisphere producers/exporters that could result from the establishment of trading alliances for selected vegetable products into key Asian markets.*
- *Commission a project that would outline a strategy for developing such alliances and how they would work in practice and identifying potential alliance partners both within Australia and internationally.*
- *Encourage through overseas visits and hosting overseas groups the development of networks and relationships that will contribute to the development of future trade opportunities.*

## **1 Introduction:**

In May 1999, Ausveg sponsored its first project (VG98142) to investigate market opportunity for Australian fresh and processed vegetables in the Hong Kong and China market. Participants in this visit included the board members of Ausveg, executive staff of member organizations, the industry development officer responsible for the export R&D group and the program manager from the HRDC. Participants attended the HOFEX 99 trade exhibition and participated in the 2<sup>nd</sup> Asia Fruit Congress.

Whilst a number of participants in this visit were sceptical about the potential value of this study tour prior to their departure, all indicated it to have been an unqualified success on their return.

The major take home messages from the 1999 visit can be summarised as follows :-

- Industry market positioning must be inclusive of both domestic and export markets in terms of quality and food safety
- A national integrated export and domestic market strategy should be developed to help coordinate regional and product strategies
- The vegetable industry, through its organizations, must actively seek to create an awareness of market realities and future opportunities and motivate sectors of the industry to respond competently and in a timely fashion
- A greater commitment must be given by the whole supply chain to lift the competitive position of Australian fresh and processed vegetables and develop a unique competitive advantage
- We must accelerate our ability to expand into export markets
- The active development of supply chain alliances will underpin our future success and must be pursued actively and professionally
- Serious consideration should be given to a national marketing and promotions strategy

- Relationship development and maintenance must be systematic at industry, supply chain and individual business levels.

Since the visit in May 1999 the industry has released the Vegetable Industry Strategic Development Plan, which identifies export market development, as one of the five goals enunciated in the plan.

In part, the purpose of the recent visit was to follow up on the 1999 study and evaluate changes that may have occurred in the intervening two years. It was also a positive response to a number of the messages from the previous study, outlined above. The project also sought to assess changes in attitude in the Hong Kong market to food safety, especially with respect to chemical residues, and identify opportunities for innovation and value adding.

The participants in this project were :-

**Mr Silvio Favero**, chairman of the Ausveg Board and chairman of the Vegetable R&D Committee

**Mr Brian Newman**, executive officer of Ausveg and a member of the Vegetable R&D Committee and secretary of the Potato R&D Committee

**Mr Jonathan Eccles**, senior program manager with HALtd responsible for the Vegetable and Potato R&D programs

## 2 Focus of the Project (VG00098):

The rapid globalisation of the international fresh and processed produce business is beginning to impact on the competitive position of the Australian vegetable industry and its efforts to expand export markets for fresh and processed vegetable products.

Whilst previous market assessments have focused on issues of concern to the Australian industry, the focus of this project was to identify issues of concern to our potential customers in Hong Kong.

The focus of this project was to :-

- Identify and evaluate issues of concern to our potential customers
- Identify or suggest ways of addressing these issues
- Propose R&D projects that would seek to resolve some of these issues

## 3 Messages from the Customers:

Discussions were held with a number of key representatives of major Hong Kong fresh produce retailers. In particular we spoke with :-

- Mr Glen Feist, director – FFC, The Dairy Farm Company Ltd (Wellcome Supermarkets and 7/11 Stores)
- Mr Stephen Chen, fresh produce category manager, Wellcome Supermarkets and 7/11 Stores
- R Noel Shield, commercial manager trading – fruit and vegetables, ParknShop
- Mr Raymond W Leung, marketing manager, Sunny Vegetables Ltd, Hong Kong

In addition we spoke with :-

- Mr William H Lin, marketing officer, Australian Trade Commission, Hong Kong
- Ms Tracy Tsang, project officer, Queensland Government Trade & Investment Office, Hong Kong and China.

A number of visits were made to wholesale markets, retail distribution centres, wet markets and a range of retail supermarket outlets. Product quality, quality assurance procedures, presentation, packaging and market support were observed in all these locations.

### 3.1 Focus on the Business rather than the Product:

Consistent messages came through in our discussions with all of these people. Their emphasis was on developing the business aspects of any trading relationship with the ability to present high quality, safe food a given. The general attitude was that quality and safety issues should be addressed before even considering export market development.

*“Australia produces good safe product and we would like to source more produce from there but its too hard to do business with a large number of individuals”*

*“You need to get your act together to do real business in the new global market”.*

*“As a retailer, I can source all the produce I need from many different countries. In some cases the product quality may not be as good as Australia but they have their act together to do volume business – they’re not competing with each other”.*

*“Even here at HOFEX the (Australian) states are competing with each other”*

### 3.2 Food safety and Retail Liability:

Issues relating to food safety and liability remain high on the agenda for all major retailers. Chemical residues on food products are the greatest risk followed closely by biological contamination. The issue of genetically modified food products is important in the Hong Kong market.

The whole issue of food safety has been brought into sharp focus by the problems in the UK / Europe market with BSE (mad cow disease) and more recently foot and mouth disease.

In order to address the issue of chemical residues in fresh vegetables, both major retailers have made major investments in their own residue testing laboratories. This testing is additional to that carried out by the government on a ‘market basket survey’ basis and the regular testing procedures carried out by the wholesale market authorities (the VMO).

In addition, the major retailers have established preferred suppliers in China for a range of produce and are providing production protocols and management systems to ensure food safety standards are met.

Hong Kong is in the process of adopting equivalent food standards to those of Australia and this is a further indicator of the sophistication of the Hong Kong market.

*Whilst food safety remains an important issue in Hong Kong a number of steps have been put in place by government and private business to address the issue and ensure food safety at the consumer level. This reduces Australia’s opportunity to use the ‘clean-green’ image as a point of market differentiation in the Hong Kong market.*

*“There is a definite view that imported food is safer”.*

*“The gap between imported and locally produced food is narrowing”.*

*“People will pay higher prices for imported (safe) food”.*

*“It’s more about perception rather than reality”.*



### 3.3 Wastage and Loss of Value:

Wastage (loss of produce through spoilage or physical damage) is an important consideration in the Hong Kong market. The investment by major retailers in state-of-the-art storage and distribution centres reinforces the importance to retailers of reducing wastage.

In the two years since the last visit, ratan baskets have all but vanished from the wet markets and have been replaced by fibreboard cartons, polystyrene boxes and plastic (one trip)crates. Handling between the distribution centres and the retail stores was in fibreboard cartons or returnable crates owned by the retailer.

At the wholesale market the reduction in the use of ratan baskets was very obvious with the majority of produce handled in plastic returnable crates owned by the market cooperative.

*The issue of produce damage in transit and wastage in store is important for all retailers as it detracts from their profitability. Australian market development should consider innovations in packaging and handling that will reduce physical damage and in-store wastage. This could provide a level of differentiation for Australian produce.*

## 4 Notes, Observations and Comment from Key Visits and Contacts During the Hong Kong Visit:

### 4.1 Notes from Visit to HIT Ltd, HK International Sea Container Terminal at Kwai Chung

Saturday 05/05/01

- Met with Mr Alan Au Yu Pong, senior manager, marketing and project
- Interesting to note that HIT is the HK container terminal operations of Hutchison Whampoa Ltd, the parent company of the ParknShop supermarket chain
- HK Container Terminal is the biggest port operation in the world and handled 16 million containers in 1999 and 11 million in 2000.
- Big investment in port development to handle even greater volumes
- Shipment of vegetables (broccoli, tomatoes, asparagus, leafy veges, potatoes, capsicums) has increased but meat has decreased. Celery, lettuce, bell peppers are big volume items from California.
- Peoples eating habits are slowly changing – many families once a week to fast food outlet for the kids. Ageing population is spending more on fruit.
- Asparagus and broccoli are now grown in China – not known there 6 years ago.
- Reefer cargo from china to HK has increased over last 6 months
- HK has been the 'smuggling' centre for high quality produce from HK to southern China. Now a lot more produce is going via HK to Shanghai and Beijing.
- The illegal trade is declining
- Imports of fresh produce into HK have gone down since 1997 due to increased competition from China.
- Reduction in tariffs into China after WTO accession (could be down from present 100 to 200% to 17.5% in three years) will have a big impact on trade. HIT Ltd is investing heavily in port development in Shanghai which will become the hub port for freight into China and for distribution to the west coast USA
- Coles/Meyer has a buying company in HK sourcing goods for the Australian market
- HK port is noted for its very fast unloading of fresh produce (direct from ship to importers trucks – often as little as two hours following ship docking)

## **4.2 Summary of notes from visit to Wellcome Supermarket Distribution Centre at Shatin (Glen Feist & Stephen Chen)**

**Saturday 05/05/01**

- Wellcome has 243 supermarket stores and 240 7/11 stores. They are opening 15 new stores in 2001
- New distribution centre is built on landfill. Land cost HK\$50 million in 1996. Centre opened in 1999. Handles all chilled and frozen produce (meat, fish, dairy, F&V)
- Daily deliveries to all stores, some twice per day. Deliveries to 7/11 stores at night. Deliveries made in refrigerated trucks split lengthwise to give different temps either side (UK design).
- Wellcome are diversifying into related food areas. They now supply all McDonalds shredded lettuce, supply 5 hospitals daily with ready cooked meals, supply 10,000 school lunch boxes par day.
- Aust lettuce good quality but HK\$4 more expensive than lower quality lettuce from California. China lettuce getting better every day.
- Wellcome HK now sources produce from 28 different countries
- Aust produce (food) has a great reputation for safety (reputation has been enhanced due to problems in Europe)
- Wellcome audits their growers in China. Now providing agronomy programs to growers and doing their own residue testing. HK government is very strict regarding food safety. Wellcome provides tight specifications for product and packaging.
- There is real potential to add value through innovative packaging and presentation. The company is seeking ways to convert commodity lines into higher value product lines.
- Pre-packs are all about customer demographics and 'confidence'. Need to build the level of confidence around a brand.
- To develop business with Wellcome you need to come with a full proposal – product, packaging, presentation, promotional package and \$ support and a properly researched business plan
- Need for product information support for young store managers
- Organic produce has a place – could grow to 10% market share in HK. May be scope for production protocols that reduce risk
- Product liability is a big issue – any ways to reduce the retailers product liability risk would be welcome.
- Reduce wastage important issue
- Recent consumer research indicated the consumers top priorities are a bigger range of produce and convenience
- In HK about 79% produce sold through wet markets and 21% through supermarkets. Planning for a 4% per annum shift to supermarkets
- About 70% of Wellcome fresh produce is coming out of China and increasing
- Wellcome have two house brands – No Frills for lower end and First Choice for top end. Will soon be introducing First Choice in the fresh food departments.

## **4.3 Observations from Visit to Wan Chai Wet Market**

**Saturday 05/05/01**

- Market was busy with many family groups shopping
- Customers are very choosy and will spend considerable time choosing a single item
- The quality of produce in the market was very good and very well presented
- Big range of produce especially vegetables
- Many leafy vegetable lines are sold with the roots still in place (to reduce water loss and avoid stem browning at cut)

- Prices for many lines are similar to those in Australia
- No pre-packs at the wet market. People like to select their purchases on the basis of colour, touch, smell.
- The market environs (street frontage) was generally clean and tidy
- The HK wet markets still handle nearly 80% of fresh F&V with many purchases made on a daily basis
- They should not be considered as 'low price' markets as prices are competitive with supermarkets

#### **4.4 Observations from Visit to ParknShop Supermarket, Hopewell Centre, Wan Chai Saturday 05/05/01**

- General produce quality was not as good as that in the wet market
- Majority of produce in pre-packs. Lettuce from California looking slimy and unattractive
- Some effort to provide services equivalent to wet market (selection and slicing of durian and fresh sugar cane juice.
- Little Aust produce in evidence

#### **4.5 Observations from Visit to Yau Ma Tei Fruit Wholesale Market, Kowloon Monday 07/05/01**

- Majority of produce in fibre board cartons.
- Significant number of light weight (one way ?) plastic crates that have replaced ratan baskets from produce out of China
- HK high humidity is very tough on cartons. Rough treatment and humidity contribute to carton breakdown and significant produce damage
- A lot of produce seen from USA, Canada, China, South Africa, Thailand, New Zealand
- Handling is still by hand trolleys. No room in market to introduce fork lifts. Loading and unloading of trucks is all done by hand.

#### **4.6 Observations from Visit to Cheung Sha Wan Vegetable Wholesale Market, Kowloon Monday 07/05/01**

- The market is run by the Vegetable Marketing Organisation (VMO) a cooperative arrangement between farmers and government. Met with Mr Ivan Yan, customer services manager.
- Here are 4 wholesale markets in HK (2 in Kowloon, 1 on HK island and 1 in New Territories)
- Cheung Sha Wan handles 800 tonnes of produce daily = 56% of HK total vegetables with 90% coming from southern China. Remaining 10% is from NZ, Holland and US
- A free trading market with buyers from chainstores, hospitals, restaurants, etc.
- Whilst the major leafy vegetable market is dominated by product from southern China there may be opportunity for Australia to supply selected lines out of season, eg – Ong Choy – 2 vars, best is from Thailand now grown in HK, short summer season – high priced vegetable. Needs to be treated like lettuce and kept crisp and fresh
- General observation that the general quality of produce had improved from previous visit in 1999.
- The VMO continues to test every consignment for chemical residues in their labs at the market.

#### **4.7 Observations from Visit to 'The Great Supermarket' at Pacific Place – a ParknShop Innovation in a Very Up Market Shopping Complex**

- The Great Supermarket is a new initiative to provide a very exclusive shopping experience to the top end of the market (Pacific Place is a very up market shopping centre). Many expatriates shop here.
- Whilst the supermarket is owned by ParknShop it is not branded this way.
- The majority of fresh produce (F&V, dairy, fish and meat) was branded by country of origin
- There was plenty of innovative packaging and superb presentation. A huge range of food products were on offer. This was very much the department store approach to food shopping. Some customers spend huge amounts on selected items.
- The stores location near the 'mid level' on Victoria Peak provides access and convenience to the most exclusive HK suburbs.
- ParknShop intend to extend this concept in other areas.

#### **4.8 Observations from Visit to Air Cargo Terminal, Hong Kong International Airport Monday 07/05/01**

- Met with Mr Jonny Cheung, manager logistics operations
- Very impressive facility. Now the second largest (behind Memphis US, home port of FedEx) air cargo handling facility in the world
- Handled 1.6 million tonnes in 1999 and 1.75 million tonnes in 2000 (perishables represented 140,000 tonnes in 2000)
- Flights on Sunday out of Australia are significantly under-utilised due to lack of wet market storage. Airport offers up to 48 hrs free cool storage at the terminal for perishable cargo
- Bulk cargo handling charge through the HK airport is HK\$1.47 per kg
- Sophisticated operation to break down bulk shipments and select for delivery – very quick and efficient. Also able to unload directly onto trucks for direct despatch to retail distribution centres – minimum time on tarmac.

#### **4.9 Observations from Visit to ParknShop Supermarket at Times Square, Causeway Bay Thursday 10/05/01**

- Two levels of produce with the lower level mostly pre-packs. Good produce, well presented. Carrots from Australia were good
- Upper level was for the high end of the market. Big range of produce with some unusual items. Many different varieties of the one product (mushrooms, tomatoes)
- Very good quality, attractively presented and at significantly higher prices than the lower level.
- Interesting store layout that encouraged customers to move through the various food department areas. Big area devoted to fresh fruit and vegetables.

#### **4.10 Observations from Visit to ParknShop and Wellcome Supermarkets at the new Shopping Centre at Tuen Mun in the New Territories**

**Friday 11/05/01**

- Tuen Mun is a dormitory suburb some 40 mins by road from HK. It is clearly a working class area
- The standard of presentation and quality of produce in the two new supermarkets visited was very high (considerably higher than often seen in comparable Australian supermarkets)
- There was often a choice of grades within a product line – cheaper carrots for soups and better, higher priced lines for other uses. There was a mixture of loose and pre-packed lines

- Fruit and vegetables were integrated into an overall fresh food shopping area with a created 'wet market' atmosphere inside a modern supermarket. The chains have been very proactive in creating this atmosphere to provide a shopping experience. There was an attempt to provide a theatrical element to the merchandising with active hawking from some produce areas (stalls).
- The food safety element is very obvious with staff wearing caps and gloves in fresh produce areas.
- These stores are designed to provide entertainment and relaxation as well as giving a positive shopping experience.

#### **4.11 Discussion with Mr Noel Shield, Commercial Manager, trading fruit and vegetables ParknShop Supermarkets**

- ParknShop have invested HK\$5 million in a laboratory to test for pesticide residues and GMO's (this comment caused some confusion) as a part of the "Fresh Check" program. The HK government has a very strict policy to identify and label GMO food products.
- The HK government is putting pressure on the supermarkets because of government ownership of the wet markets which are loosing business as the supermarket share expands. This pressure is often applied in areas of food safety with 'infringements' leading to court cases and fines.
- Organic produce has a place in HK. There is big investment US\$80 million being invested in China to develop the capability in organic production of vegetables.
- Australia is ignoring its ability to supply niche markets. There has been an inability to source a range of baby vegetables from Australia. This market is now being supplied by Swaziland. Capsicums and cucumbers from Holland because not available from Australia.
- There should be universal industry support for the "Australia Fresh" program and the "Australia Fresh" brand. The new carton gives a strong brand image and should be adopted. Australia has got to get away from the State rivalry and work together in markets like Hong Kong. No one in HK knows or cares about the Australian states.
- He has been unable to source fresh cut vegetables from Australia because of Australian concerns about cool chain integrity. So sourcing from the US – they have the same issues with cool chain but are trading anyway.
- General disappointment that Australia had still not got its act together to present their quality product in the HK market. A serious lack of a cohesive business approach.

#### **4.12 Observations from Attendance at HOFEX2001 Trade Exhibition, HK Exhibition Centre**

**Tuesday 08 to Friday 11/05/01**

- Australia had a major presence at the stand with "Australia Fresh" in a dominant position near the main entry point to Hall 5. There was a total of 78 companies in the Australian stand making it the largest national pavilion at the show.
- The "Australia Fresh" stand was well set up and manned with apples, pears, and citrus the dominant items. Exporter Don Smith (assisted by Ausveg to participate in the Food Asia exhibition in Singapore in 2000) was present with some vegetable lines
- Once again the competitive attitude between States and regions in Australia was evident with stands representing:
  - Queensland
  - Victoria (broken up further into regions Gippsland, Southeast Australia, Mornington Peninsula)
  - Tasmania
  - Western Australia

- South Australia
- Hume Riverina
- The question was again raised by a number of people as to why the various States were competing amongst themselves in a way that caused confusion amongst potential customers. The comment was made that all the fresh produce exhibits should have been packaged under the “Australia Fresh” stand to give greater impact for Australia.
- Fresh produce was on display from a number of other countries including China, Taiwan, Korea, USA (the Del Monte display was very good – they have 70% of the HK market share for pineapple and banana)
- Other contacts made at HOFEX included :
  - Western Growers Association (WGA – US) representing growers in California and Arizona who grow and pack 90% of the fresh vegetables grown in these states. Providing a linkage between the market and exporters with comprehensive directory and personal comment.
  - Evergreen Vegetable Co Ltd with operations in HK, Shenzhen, Beijing, Shanghai – producers of hydroponic Boston lettuce packed as single units in a ‘clam shell’ container, complete with roots to preserve freshness. Very good product
  - The Hyundai farming Union Corp of Korea who market a range of onion juice products, some straight and some with orange juice, pear juice added vitamin C and dietary fibre.
  - Seoro Trading Co Ltd, Jinju, Korea specialising in high quality vegetables for Japan including a range of peppers, eggfruit, cucumbers, tomatoes, sesame leaf, yams
  - Jeonbuk Corp of Korea (a joint venture company between provincial government, banks and growers) to promote trade in regional produce including a good range of vegetables.
- Attendance at the show was down on the first day (probably due to tight security for the Fortune Global Forum at the same venue attended by President Jiang Zemin of China and Bill Clinton) but became very busy later in the week.
- Interesting discussion with representatives of Intertrading Ltd of South Africa on the issue of developing southern hemisphere alliances to better exploit potential for fresh produce into North Asia. Genuine interest in the concept and would be a good contact to further discussions (maybe in association with interested parties from NZ).
- The South Africans were also interested in our cooperative arrangement with NZ for vegetable and potato R&D
- Interesting that only one e-commerce company was exhibiting when there were about 10 at the Singapore show last year.
- Overall comment – Ausveg again missed an opportunity to showcase in a generic way the vegetable produce available from Australia and our interest in expanding export market opportunities. For a modest investment the industry can be showcased to representatives of about half the world population.

#### **4.13 Observation from Participation as a Delegate to the 4th Asiafruit Congress 09 and 10/05/01**

- The 4<sup>th</sup> Asiafruit Congress, organised by Market Intelligence Ltd of the UK, the publishers of Asiafruit and Eurofruit magazines was held in the HK Convention Centre complex. The theme of this years congress was “Supplies for New Demands in the Asian Markets”
- Some 270 delegates from 30 countries registered for the two day event

- **Session 1** “Market Monitor – Measuring the Current State of the Asian Markets” – Rabobank Asia. The following points were made :-
  - Food production in China has seen an annual growth of %5 over last 5 years
  - Weaknesses in the produce industry include, labour and capital intensive, significant pest and disease problems, large range of varieties but lacking in expertise, low level of new products and processing
  - Traditional supply chain – expect 30 to 50% wastage
  - Middlemen are making the most money – growers have little opportunity to invest in new technology
  - Japan continues to impose very strict quarantine
  - Asian area has 50% of world population
  - Average GDP growth in 2001 forecast at 3 to 8%
  - Increasing consumption of fruit 5 to 20%
  - Low cost production area – costs 50 to 70% lower than many western countries
  - Trade flows in the region are increasing
- **Session 2** “New Horizons – Supply Alternatives for the Asian Buyer” with speaker panel from Argentina, Chile, Italy, Australia, South Africa Points made :-
  - Main emphasis by most countries is on export of fruits (higher value)
  - Shipping times give market advantage to US – 14 days to HK against Chile and Argentina to HK – 32 days
  - Chile has adopted the Good Agricultural Practice (GAP) program with produce certified as having been grown under a GAP program
  - The main point made in the discussion was the dual importance of Quality of Product / Quality of Business – it’s no use having one without the other.
- **Session 3** “Is Price Always Right? – Adding Value in an Evolving Market”, speakers from wholesale and retail sectors from Hong Kong, Taiwan, Korea and Philippines. Points made included:-
  - Price is an indication of supply and demand, not a measure of the quality of the business
  - There is significant opportunity to value add fruit and vegetable business in Asia but there is a need to understand the market and do the homework first.
  - Innovation in packaging and presentation has the potential to add value
  - There needs to be an alliance between all sectors of the industry to achieve the best price from the market
  - Structuring business to reduce retail liability and wastage will be attractive and add value in critical areas.
- **Session 4** “Food Safety: Effective Responses to Consumer Concern”, speakers from Australia, Japan, Taiwan, Germany. The following points were made:-
  - The safety of the food is a key issue in its ultimate value
  - Europe has developed ‘EUREP’ (Euro-Retailer Produce Working Group) it is a technical working group to encourage adoption of best practice in fruit and vegetable production. Members include the major retail chains, wholesales, and exporters.
  - EUREP has put in place a set of common agreed standards acceptable to both growers and retailers. The majority of the major European chains are members [ could be very interesting model for Australia to consider – obtain more information]
  - Asia generally is not yet ready for this level of co-operative approach
  - Consumers in Asia are not well informed about food safety issues – although it represents a significant concern
  - There has been a campaign by the media in Japan to create the impression that imported food is less safe than that grown in Japan.

- Australia is well advanced in food safety regulation and adoption of voluntary codes throughout the industry. A problem has been the proliferation of different codes, auditing procedures, etc. that has created confusion and a lack of uniformity.
- Violation of chemical residue limits in Australia are very low as demonstrated by government and private company testing.
- General comment – the Congress again provided a valuable insight into developments in the produce industry in Asia. Contacts at this level are important for Ausveg to maintain on behalf of the vegetable and potato industries.

## **5 Key Observations and Messages from the Hong Kong Visit:**

### **5.1 Food Safety – Utilise the Advantages we have in a Strategic Way**

Food safety remains a key issue for the major supermarket chains in Asia. Whilst they have been very proactive in this area, enabling them to source a big percentage of their produce from China there are still areas in which Australia could capitalise on its reputation for clean wholesome produce.

Some of the initiatives being investigated by Crop Protection Approvals Ltd would assist Australian industry to minimise the liability issues that are very important to major companies operating in the Asian market.

It would not be wise to use freedom from pesticide residues or the clean green image overtly in promotion and advertising as it may have a negative influence on the attitude of authorities in Hong Kong who are still coming to terms with the amount of business being taken away from the wet markets by the retail chains.

### **5.2 Packaging, Presentation and Branding – Opportunity to Invest in Innovation to Add Value**

There is great opportunity for Australian produce to secure niche markets for well packaged and presented produce. There is also opportunity for Australia to invest in the development of innovative packaging and presentation methods that would add value (for the consumer) and reduce product wastage (for the retailer).

Such innovations would be encouraged by the major retailers and it would be sensible to involve them in any concept and developmental stages of such a project.

Retailers operate in a very stratified market in Hong Kong and they are looking for ways of differentiation produce between the standard level (lower priced) sector and the up market higher priced sector. Innovative packaging and presentation can move commodity items into the area of branded products and we should be giving serious consideration to this area.

On several occasions representatives of the major retailers recommended the use of the “Australia Fresh” brand as the best way to raise the image and profile of all Australian produce into Asia. They believe the concept is very promotable and a united adoption by the fruit and vegetable sectors would provide the resources for proper brand support activities in the market. They are curious as to why it is taking so long for this idea to impact on the Australian industry.

### **5.3 Changing the Focus from Product to Business – If we Cannot Address this Issue we Cannot Compete**

Throughout the visit it was very clear that the focus has changed from ‘what quality of produce you can supply’ to ‘what quality of business you are willing to offer the market’.

Repeatedly, retail chain representatives made it clear that they would like to increase the volume of business they do with Australia but we must get our act together in terms of doing business. It is no longer acceptable to seek discussion on the basis of a list of products we have to sell.



The market is interested in complete packages backed up by well developed business plans that have been thoroughly researched. This requires a group/sector approach to provide the resources necessary and the product quality, consistency and volume's required.

This message is not new but it has now become the clear difference between Australia and many other countries who are able to offer buyers in Hong Kong well developed business packages to supply significant percentages of their annual requirements.

This is a message that Ausveg should be actively promotion to the vegetable industry and seek ways to facilitate its implementation before the available niche markets are lost completely.

**5.4 "Australia Fresh" – Small Investment for Big Opportunity to Showcase Our Industry**  
Congratulations again to Horticulture Australia Ltd for their efforts in making the "Australia Fresh" stand an impressive feature of the HOFEX 2001 exhibition.

Once again, the team presenting this report endorses the recommendations made following the three previous overseas visits – Ausveg should participate in "Australia Fresh" and should take advantage of the opportunity to showcase the Australian vegetable and potato industry and international trade shows such as HOFEX (Hong Kong) and Food Asia (Singapore).

**5.5 Asiafruit Congress – Annual Opportunity to Participate in International Produce Industry Event**

The annual Asiafruit Congress is a valuable forum to gain an insight into developments in the produce business in Asia. It presents an appalled opportunity to meet key players in the international produce industry and to hear their views on a variety of issues.

As a national industry organization Ausveg should continue to be represented at this annual forum in order to be well informed about international issues and developments in the Asian region.

## **6 Acknowledgements:**

The participants in this project would like to acknowledge the financial contribution of Ausveg and Horticulture Australia Ltd. Thanks also to QFVG for allowing us to participate in their field visits. Thanks to the "Australia Fresh" team for continuing to offer advice and assistance and to make our brochures available from their stand.

Thankyou to all those people in Hong Kong who freely made available their time to discuss issues of interest.

Silvio Favero  
Brian Newman  
Jonathan Eccles

May 2001

**Asia**  
**FRUIT**  
**CONGRESS**  
9-10 MAY 2001 HONG KONG



supplies for new  
demands in the Asian markets

delegate handbook



# programme

**Tuesday 8 May 2001**

**10:00 - 18:00 Visit Fresh Produce Asia at Hofex 2001**

**Wednesday 9 May 2001**

**10:00 Visit Fresh Produce Asia at Hofex 2001**

**13:00 Asiafruit Congress opens**

**13:30 "Market monitor: measuring the current state of the Asian markets"**

Kim-Anh Tempelman Rabobank (Singapore)

AnningWei Rabobank (China)

**14:30 Networking break**

**15:30 Workshop 1: "New horizons: supply alternatives for the Asian buyer"**

Carlos Bertolotti San Miguel (Argentina)

Juan Ovalle Pacific Fruit (Chile)

Silvio Ermini Adriafruit (Italy)

Russell Witcombe Mildura Fruit Company (Australia)

Lance Chandler Capespan (South Africa)

**17:30 Asiafruit Congress cocktail reception at the Hong Kong Convention Centre**

**Thursday 10 May 2001**

**09:00 Workshop 2: "Is price always right?: adding value in an evolving market"**

John Piper Food Asia Marketing Ltd (Hong Kong)

Dickens Chen Shine Food Corp (Taiwan)

Henry Neilson Wellcome (Hong Kong)

K.H. Kang Del Monte Asia-Pacific (Korea)

Paul Smits Fruitbox (Philippines)

**10:30 Networking break**

**11:30 Workshop 3: "Food safety: effective responses to consumer concern"**

Helen Lipton Moratis farms (Australia)

Yu-jan Chen Zespri (Japan)

Steven Chu Steven Chu & Associates (Taiwan)

Kristian Möller EurepGap (Germany)

**13:00 Asiafruit Congress ends**

**14:00 Supermarket tour for Asiafruit Congress delegates**

**Visit Fresh Produce Asia at Hofex 2001 until 18:00**

**Friday 11 May 2001**

**07:00 - 09:00 Wholesale market tour**

**10:00 - 18:00 Visit Fresh Produce Asia at Hofex 2001**

*N.B. This programme is provisional and is subject to changes by the organisers*



**Asiafruit Congress 2001 Delegate Handbook**



300 delegates expected



Carlos Bertolotti



Cocktail reception



Wholesale market tour



# speakers

**ASIAFRUIT CONGRESS 2001** features a similar conference format that has proved so successful in previous Congresses. It's a system that gives you as a delegate every chance to participate in the sessions and get the most out of your visit to the Asiafruit Congress.

Presentations on the state of the Asian market by Anning Wei and Kim-Anh Templeman from Rabobank International start the Congress and provide a platform for much of the discussion and debate over the two days. Workshop sessions featuring contributions from the expert speakers listed below are designed to give the audience of delegates as much opportunity as possible to contribute with their observations, comments or questions.

The sessions are divided by two networking breaks and feature a Gala Cocktail buffet on the Wednesday evening. These events give delegates the opportunity to meet and do business with a wide range of people from all over the Asian fresh produce business.



Anning Wei  
Rabobank, China

**Dr. Anning Wei** is Director and Head of Food and Agribusiness Research, Rabobank North East Asia. Dr Wei is Rabobank's premier specialist on China's F&A markets and has been a keynote speaker at a number of international conferences. He is responsible for analyzing risks and opportunities of agrifood markets faced by Rabobank and its clients in Greater China. Mr Wei holds a Ph.D. in Agricultural Economics from University of Illinois of USA. Prior to joining Rabobank, he lived in the United States where he worked for the World Bank for four years.



Kim-Anh Templeman  
Rabobank, Singapore

**Kim-Anh Templeman** is a regional industry analyst for Rabobank's Food and Agribusiness Research department in Singapore. Her team is responsible for conducting research on behalf of commercial and risk management colleagues, assisting the mergers and acquisitions department, advising regional clients and for knowledge based management activities within Southeast Asia. Prior to her posting in Singapore, Kim-Anh was stationed in Bangkok for nearly two years. She graduated from the Agricultural University of Wageningen the Netherlands with a masters degree in animal science.



Carlos Bertolotti  
San Miguel, Argentina

**Carlos Bertolotti** is S.A San Migue's commercial manager and he has held this position for seven years. Mr Bertolotti is responsible for developing the Asian market and to be effective in the region, he believes that it is vital to respond to clients needs. S.A San Miguel is a major citrus player and accounts for 40 per cent of the Argentine lemon export deal. The producer also ships oranges, easy peelers and grapefruit to Asia and has recently expanded its export portfolio to include grapes, apples, pears and peaches.



Juan Ovalle  
Pacific Fruit, Chile

**Juan Ovalle** is president and commercial manager of Pacific SA, a highly specialised packer and exporter of citrus, fresh cherries and kiwifruit from Chile. Mr Ovalle graduated as an agronomist engineer from the Universidad Católica de Chile. He developed his knowledge of the fruit trade after working for several years in the US, Europe and throughout South America. Today all his experience is dedicated to developing Pacific SA as a reliable supplier of top quality fruit from Chile.



supplies for new  
demands in the ... markets

# speakers



**Russell Witcombe**  
Mildura Fruit Company,  
Australia

**Russell Witcombe** studied agricultural science at Melbourne University (1970-1973) prior to post graduate study in agricultural economics at the University of New England. After nine years in the Victorian Department of Agriculture working as an economist in grazing, cropping and horticultural industries, he worked for four years as a rural financial counsellor, assisting fruit growing families suffering severe financial hardship following successive seasons of poor returns in a climate of high interest rates. He returned to commercial horticulture in 1988 as marketing manager for Sun Garden Packers Pty Ltd and is now managing director of the Mildura Fruit Company following the 1997 merger with Sun Garden Packers. Mildura Fruit Company operations are heavily focused on export markets with 1.5m cartons of citrus packed for overseas markets last season. Mr Witcombe is currently chairman of the Australian Horticultural Exporters Association Inc.



**Lance Chandler**  
Capespan, South Africa

**Lance Chandler** is the newly appointed ceo of the Citrus Business Unit within Capespan. Mr Chandler, who is a qualified chartered accountant, comes from a background in the pineapple exporting and processing industry. His appointment follows the formation of four fruit business divisions during the latter half of 2000: hard citrus, grapes, topfruit and stone fruit/soft citrus. The Capespan Group is one of the world's leading fruit marketing organisations, marketing nearly 70 million cartons of South African fruit at a value of R5bn in 66 countries on six continents. Capespan has a strong presence in Asia, where it operates through its joint ventures, Goldspan, based in Tokyo and Metspan, based in Hong Kong.



**Silvio Ermini**  
Adriafruit, Italy

**Silvio Ermini** is managing director of fresh produce exporter/importer Adriafruit Italia. Adriafruit was formed in 1992 and it now has a staff of 25 and an annual turnover of US\$80m. Adriafruit exports a wide range of Italian produce all over the world under its principal brand 'Adria'. Last year it increased kiwifruit, apple and grape exports to Asia by 100 per cent to 2,000 tonnes. Since 1998 Adriafruit has imported fresh produce using its warehouse in Albenga near Genoa to distribute throughout Italy.



**John Piper**  
FoodAsia Marketing Ltd,  
Hong Kong

**John Piper's** Hong Kong-based company, Food Asia Marketing Limited, is in its eighth year of operation. Food Asia Marketing represents fresh produce exporter clients from the Americas, Europe, Australia and within Asia itself, providing them with 'on-the-ground' sales and marketing information and support in serving their customers throughout the Asia-Pacific region. Mr Piper has been resident in Hong Kong since 1987, the first five years of which, prior to establishing his own business, he was fresh foods manager of one of Asia's largest supermarket chains.



**Henry Neilson**  
Wellcome, Hong Kong

**Henry Neilson** is director of fresh foods at Wellcome, Hong Kong's largest retail chain. He has over 22 years of retail experience in Hong Kong and the UK and prior to joining Wellcome, Mr Neilson had worked for Park 'N Shop in Hong Kong and Asda in the UK. Mr Neilson has managed stores ranging from 2,000 sq ft to 65,000 sq ft. He also has experience of running discount, supermarket, superstore and hypermarket outlets. Wellcome is owned by Dairy Farm, a group with substantial retail operations in the region including 7-Eleven and Cold Storage.



**Dickens Chen**  
Shine Food Corp, Taiwan

**Dickens Chen** is president of Shine Food Corporation, a Taiwan-based import and export company. Shine Food handles a wide variety of fresh produce including topfruit, stonefruit and citrus and counts the US, Chile, Europe and Asia as its main fruit suppliers. According to Mr Chen, Shine Food has integrated its wholesale and retail channels, which has strengthened the company's operations. Dickens attained his MBA from Tulane University and his executive MBA from National Chengchi University.





# speakers



**K.H. Kang**  
Del Monte Asia-Pacific,  
Korea

**K.H. Kang** joined Del Monte Fresh Fruit Far East B.V. Korea Branch in April 1993 as an administrative assistant. One year later Mr Kang was promoted to a managerial position and then became a country manager in 1996. Del Monte Fresh Produce (Korea) Ltd. markets its products directly to customers in Korea from its logistics facility in Masan, south Kyungsang Province. Because Del Monte markets its products directly to its customer it has been able to convert cost savings to improve its distribution system and invest in marketing activities for its customers and consumers. Prior to joining Del Monte, Mr Kang worked for the Korea Exchange Bank.



**Paul Smits**  
Fruitbox, Philippines

**Paul Smits** has been involved in the fresh produce industry since 1990. Last year he started a new company, The Fruitbox, which offers business development and marketing services. Fruitbox is now working with Korea Marketing Company, a major importer, distributor and marketer of fresh produce in South Korea. His previous positions include General Manager of Fresh Asia Produce Company International (Shipper/Exporter), Davao Cold Storage Corporation (Terminal Operator/ Storage) and Mindanao Fresh Produce Services Corporation (Quality Control) all within the Lapanday Foods Corporation. Prior to his contract with Lapanday Foods, he was with Chiquita Services International Group, based in Antwerp, as Logistics Manager responsible for operations in Europe, the Mediterranean and the Middle East.



**Kristian Möller**  
EurepGap, Germany

**Dr. Kristian Möller** is managing director of Foodplus GmbH and has been the Secretary for EUREP (Euro-Retailer Produce Working Group) since its creation in 1997. EUREP was founded as a technical working party whose aims were to promote and encourage best agricultural practice in fruit and vegetable production. Its members include Albert Heijn, Tesco, Kesko, COOP Italia, Spar, Österreich, Delhaize and Groupe Promodès. Over its five years of existence EUREP has been developing a framework for Good Agricultural Practice in horticultural production.



**Helen Lipton**  
Moratis Farms, Australia

**Helen Lipton** is group quality manager for the Moratis Group. Her current role involves integrating food safety and quality management at every stage of the supply chain. She also assists the Moratis Group in implementing various standards including ISO 9002 and HACCP. The Moratis Group is one of Australia's largest fruit and vegetable wholesaling companies with numerous warehouses and market outlets located along the eastern seaboard including a state-of-the-art fresh cut salad factory in Sydney. Last year, Ms Lipton managed the Olympics 2000 food safety programme for fresh cut salads, fruit and vegetables. According to Ms Lipton, the Moratis Group was the sole supplier to this event.



**Steven Chu**  
Steven Chu & Associates,  
Taiwan

**Steven Chu** is president of Steven Chu & Associates, a marketing firm founded in 1986 to serve national and multi-national corporations operating in the Taiwan market. SCA offers its clients a proven and broad expertise in marketing and related consulting services. At present, there are 10 professional staff members working in three divisions: Fresh Fruits, Processed Foods, and Planning & Management, to serve its current clients. Mr Chu has also developed an associate company, Food & Marketing Service Corporation, to design and implement all the assigned promotional and merchandising activities, as well as in-house research and evaluation on behalf of his clients through the regional offices located in Taiwan's three major cities: Taipei, Taichung and Kaohsiung.



**Yu-jan Chen**  
Zespri, Japan

**Yu-jan Chen** joined the New Zealand Kiwifruit Marketing Board in September 1994 as a General Manager in the Japan office. After a successful season, he became General Manager, East Asia in 1995 covering the territories of Japan, China, Taiwan, Korea and Hong Kong. In April 2000, he became General Manager, Zespri International Asia, adding South East Asian countries such as Singapore, Malaysia, Indonesia, Thailand to those mentioned. Mr Chen qualified with an MBA from IMD in Switzerland and started his business career with an American conglomerate, Proctor & Gamble, in the late 1980's where he was a marketing professional in the international marketing division.





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