

## The Hong Kong Market for Fresh Fruits and Vegetables

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### EXECUTIVE SUMMARY

Every day the population of Hong Kong consumes about 950 tons of rice, 1,020 tons of vegetables, 7,610 pigs, 270 tons of poultry, 570 tons of fish and 1,700 tons of fruit. As only 7% of Hong Kong's land area is suitable for farming, local production is especially geared to the production of high quality fresh vegetables and flowers, but even so, farmers are only able to supply less than one quarter of the vegetables and a lesser amount of fruits.

The territory imported some HK\$ 44,986 million ( U.S.\$ 1 = HK\$ 7.75) worth of foodstuffs in 1993, and the major imports were fish (HK\$ 10,426 million), fruit (HK\$ 6,878 million), meat (HK\$ 5,665 million), and vegetables (HK\$ 4,228 million).

Hong Kong's External Trade Statistics reflect imports of vegetables and fruits at HK\$ 11,000,000,000 for 1993. This includes fresh and processed product, and is the largest single category of Hong Kong's overall food imports of HK\$40 billion. China is the leading supplier, followed by U.S. Thailand, Japan, Australia, Singapore, the Netherlands and Taiwan. For the selected fresh fruit, vegetable and nuts covered in this report, Hong Kong's total imports in 1993 were HK\$1,155,075,000 for vegetables and HK\$ 4,764,208,000 for fruits and nuts. Indonesia's market share of Hong Kong's imports in 1993 was 1.6% for vegetables (assuming we include ginger, the major import from Indonesia, as a vegetable) and for fruit and selected nuts 0.6%. (See Tables 1 and 2).

The major reasons for the less than optimal export performance of Indonesian fruits and vegetables on the Hong Kong Market include:

- Lack of a complete "cold chain" to keep product chilled from point of production to point of consumption, resulting in lower value or inability to ship at all;
- Poor post harvest handling techniques, resulting in higher losses;
- Low quality image with the trade, resulting in lack of interest;
- Lack of diversification, resulting in the trade not knowing that various fruits and vegetables are available, or could be grown here; and,
- Relatively high transport costs, resulting in lack of competitiveness.

The major recommendations of this report are that Indonesian exporters:

- Take advantage of the high comparative advantage of labor costs (Hong Kong wages are on average ten times those of Indonesia) to prepackage and otherwise shift the labor burden from Hong Kong to Indonesia;
- Work together to develop effective trade associations to lower transport costs and to develop alternative transport methods;
- Promote the development of diversified, higher value horticulture, utilizing market demanded varieties; and,
- Promote the development of cropping programs in various parts of the country that will yield year-round availability of crops, where possible .

There appear to be specific opportunities for Indonesian exports to Hong Kong of:

- Beefsteak and cherry tomatoes
- Leeks and spring onions
- Chinese type cabbages and Oriental leafy vegetables

- Carrots
- Snow peas
- Chille Peppers
- Ginger
- Mandarins
- Limes
- Bananas
- Coconuts
- Watermelon
- Cantaloupe and Honeydew (off season)
- Papaya
- Strawberries (off season)
- Pineapple
- Avocado
- Guava
- Mango
- Mangosteen
- Lychee
- Longan
- Durian

### MARKET OVERVIEW

Hong Kong, like Singapore, is an entrepot city with few natural resources. Originally a collection of some 20 villages whose main resource was a natural harbor and whose principal activity was fishing, Hong Kong failed to grow until ceded to the British. With an initial population of 3,650 residents plus 2,000 fishermen residing on boats in the early 1800's, and with a mountainous terrain deficient in arable land and sufficient water, Hong Kong possessed really one natural asset: the harbor, and this was the chief attraction for the British, who established Hong Kong as a commercial and trading center under the British flag in 1841. Population growth was slow at first, and population rose from about 32,000 in 1851 to 870,000 in 1931: real growth only took off after Japanese occupation of mainland China, causing a mass exodus and bringing Hong Kong's population to 1.6 million at the outbreak of WWII. Following the Japanese surrender there was another massive exodus from mainland China coincident to the defeat of the Chinese Nationalist government, and by the mid-1950's Hong Kong's population had swelled to about 2.5 million, and since then has grown to about 6 million people.

The population of Hong Kong passed the 6 million mark in 1993 and is now at 6,020 thousand, an increase of 11.9% over the 1983 levels, or an average annual growth of just over 1%. With a total land area of only 1078 square kilometers, Hong Kong is one of the most densely populated cities in the world, with an average density of 5,700 per square kilometer. The average conceals that Hong Kong Island, Ceylon and New Ceylon average 26,180 people per square kilometer while the New Territories average 2,790. The population is starting to age: in 1983, 24.1% were under the age of 15, while in 1993 only 20% were.

About three million people, or half the population, reside in subsidized public housing. 2.6 million of these reside in 688,000 rental units. This effects food purchasing and consumption, since the average house size is small, kitchens are limited in space, and there is frequently a lack of refrigeration, leading to daily purchases of fresh fruits and vegetables in small quantities.

Tourism is the territory's second largest earner of foreign exchange, and a record of 7.2 million visitors, (excluding those from China) visited Hong Kong in 1993, generating earnings of HK\$53.2 billion ( 1U.S.\$ = HK\$ 7.75). In addition, some 1.7 million arrivals were recorded from China in the period from April-December. Aside from China, the major sources of tourists are Taiwan (19.9%), West Europe (11.7), North America (10.6) and Australia and New Zealand (3.5%).

The economy is dependent on imports for virtually all its needs, including food, consumer goods, raw materials, capital goods, fuel and water: evidence of this can be seen in the fact that in 1993, ocean going vessels discharged an estimated 70 million tons of cargo in Hong Kong, while loading only 28 million tons. Primary production (agriculture, fisheries, mining and quarrying) contributes less than 1% to GDP and employment. Manufacturing accounts for a significant share of employment (22%), but has decreased from 31% of GDP in 1970 to 13% currently, reflecting the migration of manufacturing to mainland China to take advantage of lower labor and real estate costs. The remaining

manufacturing jobs in Hong Kong are relatively high value added, as reflected in the fact that manufacturing output has been growing at an annual rate of 14%, while the number of employees has been shrinking at an annual average rate of 1%. The single largest sector of the economy is the wholesale, retail, and import/export trade, including restaurants and hotels, which together contribute 26% of GDP, (and 43% of employment) followed closely by financing, insurance and real estate, which contributes 24% of GDP and 15% of employment. Almost 70% of employment in Hong Kong is in the services sector.

Entrepot trade with China grew rapidly as that country pursued an open door policy beginning in the mid 1970's, and trade was further encouraged by general growth in the Asia Pacific region. In 1993, trade with China grew by an additional 18% over 1992 levels and reached HK\$740 billion. China alone accounts for 28% of Hong Kong's domestic exports, and 88% of the goods re-exported through Hong Kong were destined for or originated from China.

Hong Kong is the tenth largest trading entity in the world with exports of HK\$ 1,046,251 million and imports of HK\$1,072,597 million. The territory imported some HK\$ 44,986 million worth of foodstuffs in 1993, and the major imports were fish, HK\$ 10,426 million, fruit, HK \$6,878 million, meat HK\$ 5,665 million, and vegetables, HK\$ 4,228 million.

Employment currently stands at 2.8 million, of which 63% are male and 37% female. The overall average monthly wage rate is HK\$6,780, but for those in the wholesale, retail, import, export, hotel and restaurant trades averages HK\$ 8,579.

Most manual workers receive a wage in excess of \$189 per day: 25% receive \$297 or more. Relatively high wage rates, the lack of refrigeration and cooking space in the home, and the high proportion of working women encourages consumption of food away from home, and makes the restaurant sector relatively more important to total food trade. In turn, the restaurant sector tends to be much more price conscious than the consumer sector.

In 1984, the Sino-British Joint Declaration on the Question of Hong Kong was signed, and under the agreement British administration and jurisdiction over Hong Kong will cease on June 30, 1997. From July 1, 1997 Hong Kong will become a Special Administrative Region (SAR) of the People's Republic of China. The agreement provides that for 50 years after 1997, Hong Kong's lifestyle will not change, and the territory will enjoy a high degree of autonomy, except in foreign and defense affairs, and China's socialist system will not be practiced in the SAR.

### DOMESTIC PRODUCTION

Agriculture and fishing accounts for only .2% of the gross domestic product of Hong Kong.

Every day the population of Hong Kong consumes about 950 tons of rice, 1,020 tons of vegetables, 7,610 pigs, 270 tons of poultry, 570 tons of fish and 1,700 tons of fruit. As only 7% of Hong Kong's land area is suitable for farming, local production is especially geared to the production of high quality fresh vegetables and flowers, but even so, farmers are only able to supply less than one quarter of the vegetables and a lesser amount of fruits.

Production of poultry and pigs is being gradually phased out with the introduction of stricter environmental and pollution control measures.

About 1,740 hectares of land were under vegetable or flower cultivation in 1993, with the main crops being white cabbage, flowering cabbage and lettuce. These are grown throughout the year, but production peaks in the cool winter months. Smaller amounts of tomatoes, sweet corn, and celery are also produced, as are straw mushrooms, which are grown on industrial cotton waste as the growing medium.

HONG KONG DOMESTIC PRODUCTION OF SELECTED FOODSTUFFS 1991-1993				
PRODUCT	MEASURE	1991	1992	1993
VEGETABLES(FRESH, FROZEN OR PRESERVED)	TON	105,000	95,000	91,000
FRESH FRUITS AND NUTS	TON	3,950	2,730	4,150
PIGS	000'	31	18	169

CHICKEN	TON	26,500	21,200	20,700
OTHER POULTRY	TON	9,900	5,900	5,600
EGGS	000'	84,500	52,600	7,800

Some 65 cooperative societies and two federations, totalling 10,535 farmer members operate under the Agriculture and Fisheries Department, which provides technical assistance, extension workers, propagates seeds, researches new production techniques and advises on pest management. Encouragement is given to the adoption of labor saving techniques, organic farming and hydroponics, and the department assists in the marketing of vegetables through the Vegetable Marketing Organization, which handles about 43% of the locally produced vegetables.

The Vegetable Marketing Organization seeks to maximize farmers returns by minimizing marketing costs and is responsible for transporting vegetables from the New Territories to the wholesale markets in Ceylon. It provides the marketing facilities, supervises sales and financial transactions, and obtains its revenues from a commission of 10% of sales. It also provides ancillary services such as the acquisition and distribution of agricultural supplies, and monitors pesticide levels of both locally produced and imported vegetables. In 1993, the Vegetable Marketing Organization sold 37,300 tons of local vegetables valued at HE\$114 million.

### FRESH FRUIT AND VEGETABLE IMPORTS

Hong Kong's External Trade Statistics reflect imports of vegetables and fruits at HK\$ 11,000,000,000 for 1993. This includes fresh and processed product, and is the largest single category of Hong Kong's overall food imports of HK\$40 billion. China is the leading supplier, followed by U.S. Thailand, Japan, Australia, Singapore, the Netherlands and Taiwan.

Citrus fruits are the leading category of imports and accounted for more than HK\$6.8 billion in 1993. The U.S. is the leading supplier with over 60% of the citrus category, while vegetables, with imports of HK\$4,187 million were dominated by China with 60% of that category. China mainly supplies the traditional crops of flowering and white cabbages, kale, string beans and Chinese melons.

As can be seen in the 2 tables following, Indonesia's market share is very low, with only four products accounting for the bulk of her export performance - cashew nuts, bananas, ginger, and round cabbage. These four items account for 89% of Hong Kong's fresh fruit and vegetable imports from Indonesia and are reflective of the lack of diversification of the production base.

### FRUIT AND VEGETABLE CONSUMPTION AND CHINESE NUTRITION

While Westerners look at food and see calories, cholesterol, protein, carbohydrates, vitamins and minerals, the Hong Kong Cantonese looks at food and sees the potentials for affecting the body's intrinsic balance of hold, cold, wet, dry. Thus each fruit and vegetable has its own innate characteristics, and is chosen or rejected in accordance with the consumer's wish to effect a particular outcome.

Warming foods are thought to generate heat in the body and are used stimulate metabolism, warm the extremities and produce extra energy. Conversely, they also irritate inflammations and worsen infection, and thus would not be chosen for the sick. Typical warming foods are beef, ginger and carrots.

Cooling foods, such as cucumbers, produce smooth sliding effects and promote cleansing and a relief from heat and a loss of weight. Leafy vegetables and cucumbers as well as most fruits are thought of as cooling.

The dampness and dryness effects are brought about by the Chinese belief that water balance in the body is effected by different types of food. Damp foods cause water retention, arthritis, and skin problems (fungal infections), while dry foods cause thirst, dry skin, constipation and coughing.

Where possible the authors have indicated the characteristics associated with each fruit and vegetables, and have tried to indicate how these principals effect consumption patterns.

### MAJOR MARKET SEGMENTS

#### Retail

The retail trade is divided into three segments: supermarkets, wet markets, and fruit and vegetable hawkers. There are more than 800 supermarkets in Hong Kong but the supermarket trade is in turn dominated by only two chains: Wellcome, with 200 stores and ParkNShop, with 190 stores. During the past few years there has been some development of other competing supermarkets by both Hong Kong and Japanese entrepreneurs, but these are not yet a competitive threat. Supermarkets have been making increased efforts in the past few years to increase their share of the fruit and vegetable business by allowing consumers to pick by the piece, replenishing stocks more frequently, and stocking a broader range of produce. Typical supermarket shoppers are younger and better educated, and tend to come from families with two incomes.

Wet markets are where the average Hong Kong resident shops on a daily basis, though they are slowly decreasing in importance. Present estimates by the trade are that 75-90% of the fruit and 75-95% of the vegetables purchased in Hong Kong are from the wet markets, down from 95 and 99% respectively in 1985. It should also be noted that most prepared food hawkers, and many small restaurants, which account for up to 40% of the food consumed in Hong Kong, also purchase from wet markets, since prices are generally lower.

Fruit and vegetable hawkers, most of whom operate illegally, are credited by the trade with assisting in the movement of large quantities of fruits and vegetables, and they are patronized by office workers hungry for a fruit snack as well as housewives who need to purchase a few items on their way home but don't wish to stop at a wet market. Consumers apparently prefer to buy from hawkers in the belief that since they have no refrigeration, their product must be the freshest, since it has to be disposed of every day, and also because left over stocks at the end of the day are sold at bargain prices. For convenience they are unparalleled, since they are literally located on each street corner in high traffic areas. As of the end of 1993 there were 13,606 licensed street hawkers in Hong Kong, many of whom sell fresh fruits and vegetables, particularly the former. The Government has announced a policy of eliminating itinerant hawkers, and they will cease to exist in April 1996, but "fixed-pitch" hawkers will still be allowed. Itinerant hawkers are also being encouraged to become market stall tenants.

Also developing in the Hong Kong market are specialty fruit stores carrying the higher value products, and juice stalls, where freshly squeezed juices are prepared for on the spot consumption. The trade belief is that these will become more important in the future.

### **Institutional/industrial**

As of 1993, there were 804 food processing establishments in Hong Kong, but 85% of these employ fewer than 20 workers. There is some production of prepared and preserved vegetables, but it is thought that this segments' needs are met by Mainland China and the New Territories. One major possible segment that might be of interest to Indonesian producers is the vegetable and seasoning requirements of the instant noodle industry, which is the largest single segment of the processed foods industry

### **Food Service**

With comparatively high incomes that are fairly well distributed, the high percentage of working woman, and the Westernization of Hong Kong, eating out is a major consumer of food dollars, and some estimates are that 45-55% of Hong Kong residents' incomes are spent on food away from home. There are more than 8,000 restaurants in Hong Kong, and when the 9 million tourists are added in the picture is of an extremely vibrant food service market.

## **CHANNELS OF DISTRIBUTION**

The channels of distribution in Hong Kong are typical, but the leading supermarket chains tend to import directly, as do the large restaurant and institutional suppliers. The wet markets, smaller food service distributors, and smaller supermarkets tend to buy from the wholesalers.

## **TRANSPORTATION**

Hong Kong has the busiest container port in the world, handling more than 9 million TEU (twenty foot equivalent units) in 1993. To meet forecast demand for services up to the year 2011, Hong Kong is building a new port facility. It is estimated that demand is increasing 1 million tons per year, which means that Hong Kong must add the equivalent of the Port of Oakland California each year. The new port at Lantau will add 24 new container berths to the existing 15 berths at Kwai Chung, which is also expanding its capacity by an additional 7 berths. In other words, between now and 2011, Hong Kong will triple its port capacity.

Hong Kong statistics show 24.5 million passengers through the terminal at Tai Kak, and 1.14 million tons of air cargo. Total aircraft movement in 1993 was 135,100, of which 78% were wide bodied. Hong Kong is building a new airport at Chek Lap Kok to replace Tai Kak, as the latter has only one runway and is approaching its physical capacity of 28 million passengers. In fact it is believed that capacity will be reached before the planned completion date of the new airport in 1997. The new airport's planned capacity is 35 million passengers and 1.5 million tons of cargo per year on the first runway to be completed and planned expansion to 87 million passengers and 9 million tons of cargo by the year 2040.

Rates quoted from Medan are as follows:

SEA FREIGHT RATES MEDAN TO HONG KONG IN \$U.S.			
	40 FOOT DRY	20 FOOT DRY	20 FOOT REEFER
MAERSK LINE	\$910	\$610	\$2,800
SEA LAND	\$1,000	\$750	N.A
JAYA PERDANA KASUMA	\$935	\$610	N.A

Quoted air freight rates are \$1.00 to 1.10, but it is believed actual rates of about .50 can be negotiated for consistent high volumes.

#### PRICING AND MARGINS

A relative degree of understanding of the markups and margins involved in the overall food and drink category was obtained from the "Survey of Wholesale, Retail and Import/Export Trades, Restaurants and Hotels.

FOODSTUFFS, ALCOHOLIC DRINKS AND TOBACCO PURCHASES AND SALES, 1993, IN BILLIONS OF HK\$		
	PURCHASE OF GOODS FOR SALE	SALES AND RECEIPTS
WHOLESALE	34.4	37.6
RETAIL	28.7	37.7
IMPORT/EXPORT	71.2	83.2
RESTAURANTS	17.4	47.3

Retail Prices for Fresh Fruits and Vegetables (in Hong Kong Dollars, one U.S.\$ equals HK\$7.50) at a leading chain were:

Chile - Green	\$4.90 each
- Red	\$4.10 each
Durian	\$10.90/lb.
Philippines pineapple	\$9.90/lb.
Solo small papaya	\$4.20/lb.
Kiwano melon	\$16.90 each
Banana	\$3.30/lb.
Coconut	\$7.50 each
Oranges	\$14.90 /pack of 6
NZ Oranges	\$3.90 each

U.S. Lime	\$2.30 each
U.S. Lemon	\$1.90 each
U.S. Grapefruit	\$2.90 each
Red apple	\$1.90 each
Granny Smith apple	\$2.70 each
Young coconut	\$10.90 each
Pear	\$2.50 each
Korean pear	\$6.50 each
Seedless grapes	\$18.50/lb.
Watermelon	\$3.80 each
Strawberries	\$20.90/250 grams
Peaches	\$19.90/lb.
Honeydews (Australia)	\$8.90/lb
Rockmelon	\$2.60/lb
Avocado	\$6.80 each
U.S. lettuce	\$11.90 each
U.S. curly lettuce	\$14.90 each
Aus Tomato	\$19.90/lb
Cherry Tomato	\$18.90/250 grams
Radish	\$10.90/250 grams
N Z snow peas shoots	\$16.80/250 grams
Bean sprouts	\$9.90/pack
Button mushroom	\$22.90/lb.
Chinese Cabbage	\$15.90 each
Round Cabbage	\$7.60 each
Cauliflower	\$13.95 each
Broccoli	\$17.95 each
Pepper - Green	\$26.96/lb.
- Red	\$29.90/lb.
- Yellow	\$32.90/lb
Snowpea	\$12.90/250 grams
Green bean	\$12.90/250 grams
Aus carrot	\$11.90/Kg
Sweet corn	\$11.90/lb.
Baby corn	\$26.70/lb.
Leek	\$20.90/lb.
Ginger	\$5.80/0.7 lb.
Red onion	\$14.90/lb.
Salad mix	\$12.90 - \$14.90 per pack of 250 grams
Aus Tomato	\$9.90/lb.

Dutch tomato	\$19.90/lb.
Egg plant - local	\$7.90/lb.
Egg plant - Dutch	\$18.90/lb.

### PACKAGING

Packaging in the Hong Kong market varies significantly from wooden/bamboo crates to corrugated and/or styrofoam boxes, with the quality of the packaging varying according to the target market segment. If the target market is the Wellcome chain or one of the up-scale institutional importers with large hotel and restaurant accounts, only the most sophisticated packaging is appropriate and expected. If the target market is the wet market or one of the ubiquitous food stalls only packaging necessary to get the product through the channels of distribution is necessary. In the early morning hours deliveries to these stalls are made by hand truck, so it should be kept in mind that package sizes should be kept relatively small.

### TERMS OF TRADE

As with most other countries there are two basic methods of sale to Hong Kong: consignment, either through straight consignment or with a reserve price below which the seller is unwilling to part with his produce or by letter of credit. The latter method, while preferred by many sellers, is very difficult to obtain and is usually only awarded to sellers having a lengthy historical record with the importer or to those with very difficult to obtain or unusual products. It should be noted here that Hong Kong is notorious in the fresh fruit and vegetable business for the presence of many unethical "fly by night" importers who will speculate on cargoes of fresh fruits and vegetables, having no intention to pay if the price drops below a profitable point. These operators will frequently assure an unwitting seller that they can sell his produce on consignment, but become extremely difficult to find after the fact. Their capital is frequently only a cellular phone.

While the Hong Kong Yellow Pages include listings for hundreds of fruit and vegetable wholesalers and importers only those recommended by reputable sources are included in the lists in Appendix A.

### QUALITY STANDARDS AND FOOD SAFETY REGULATIONS

The health inspectorate of the Hygiene Division of the Department of Health is responsible for insuring that consumers are able to buy good wholesome food which is unadulterated, uncontaminated, properly described and of nutritious quality. The inspectorate prioritizes food items according to the nature of the food and the potential risks they impose to consumers. In addition to regular laboratory analyses, they perform field test for pesticide residues on imported vegetables at points of entry into Hong Kong. Enforcement is not rigorous.

### HONG KONG PHYTOSANITARY REQUIREMENTS

Countries exporting agricultural produce to Hong Kong are expected to grow, harvest, and process food according to the Code of Hygienic Practice recommended by the Codex Alimentarius Commission of the Food and Agriculture Organization of the United Nations, the code of the World Health Organization, or other recognized good manufacturing or agricultural practices. Hong Kong's Department of Agriculture and Fisheries is responsible for enforcing phytosanitary regulations.

To ensure the quality and wholesomeness of food exports before they leave their countries of origin, authorities in these countries are requested to issue phytosanitary certificates for products destined for Hong Kong. A list of certification authorities can be obtained by writing to the Senior Superintendent of Foods, Hygiene Division, Department of Health, U.C. Fa Yuen Street Complex, 123A Fa Yuen Street, 8th Floor, Kowloon, Hong Kong (Tel.: 852-3920396). Phytosanitary certificates should follow the format and contain the information solicited below:

1. The fruits/vegetables are of \_\_\_\_\_ (name of the country/place of production) origin.
2. The fruits/vegetables are free from insect infestation.
3. The fruits/vegetables do not contain any substance or substances including pesticides, trace metals, etc. in amounts considered poisonous, harmful, or injurious to health.
4. The fruits/vegetables are fit for human consumption and are permitted to be sold as food for human consumption in \_\_\_\_\_ (name of country of origin).

### Prohibited Products



The following products are not allowed into Hong Kong:

- Plants of all species of Arachis (groundnut, peanut) except from China;
- All plant pests from all countries unless accompanied by a written authorization from the Director of Agriculture and Fisheries; and
- Soil and plants with soil attached from all countries unless accompanied by a written authorization from the Director of Agriculture and Fisheries.

### **Restricted Products**

The following products are allowed entry but are subject to import inspection; each shipment must be accompanied by a phytosanitary certificate and import permit.

- Plants --- bulbs, corms, cuttings, flowers, fruits, layers, leaves, roots, shrubs, slips, stocks, suckers, trees, and vegetables.

Authorities will not issue phytosanitary certificates without an import permit for each of the restricted products. To request import permits, contact the Director of Agriculture and Fisheries, Canton Road Government Offices, 393 Canton Road, Kowloon, Hong Kong.

### **Unrestricted Products**

Unrestricted Products, shown below, need not be accompanied by a phytosanitary certificate but may face delays at customs for entry into Hong Kong;

- Cut flowers;
- Fruit for consumption;
- Plants and plant products from China;
- Seeds for consumption or processing except peanuts;
- Spices for consumption or processing;
- Timber including bamboo and rattan;
- Vegetables for consumption including edible tubers, roots, corms, and bulbs;
- Grains and pulses; and
- Cereals for consumption or processing - barley, corn, millets, oats, rice, rye, sorghum, teff, triticale, wheat einkorn, emmer, and spelt.

### **Other**

Importers are required to file a Form 1-A with the Commissioner of Customs and Excise within 14 days of importing any foodstuff, either in paper or electronic format. There is no requirement that the importer be a Hong Kong company, but the importer must be able to list a contact point, address and phone number in Hong Kong. While there is no duty on foodstuffs, there is an ad valorem charge of \$5 per declaration, irrespective of the value of the import.

### **NOTES ON STATISTICAL SOURCES**

Seasonal data was not available for all fruits and vegetables, but where available it is included so that Indonesian producers and exporters can plan plantings and harvest times appropriately.

Annual data covering the last several years is included so that import trends can be discerned, but again this data was not always available.

Please note that not all data are additive-- in some cases the authors were able to obtain detailed data on sub-categories. Thus there is one table on onions and shallots, and another on shallots only. The shallot data is a sub-category of the onion and shallot data, not in addition.

### **NOTES ON VEGETABLE IMPORTS**

## Potatoes

### Seasonality

In 1993, China accounted for 60% of Hong Kong's imports of potatoes. However, note that of the total Hong Kong imports of about 9,000 tons from China, 4,896 tons or more than 50% was imported in the period August-November.

April through June appears to be a period during which the market is "under-supplied," as throughout the remainder of the year, Hong Kong imports are generally at or above 1,000 tons per month.

Taiwan is an effective supplier only for the period February through May, while Australia competes November through February, and New Zealand April through July.

Note that the U.S. is a consistent supplier to the market - this is largely due to the U.S. varieties, which are preferred for baking and for snack and chip manufacture, as they are high solids, low water content varieties.

### Market trends

China's exports of potatoes to Hong Kong peaked in 1990 and have been falling for the past three years, while Taiwan has shown little consistency in its ability to supply, decreasing levels of exports in 1993 to only 613 tons, down from a peak of more than 8,000 tons in 1987.

The U.S., Netherlands and New Zealand have demonstrated an ability to take increasing market share in what appears to be a slowly declining total market, since 1987 imports have been trending down at the rate of about 1,000 tons per year. This may reflect a substitution of frozen potatoes for fresh.

Finally, note that the U.S. receives a high premium for its potatoes, with an average price of \$578 per ton, compared to \$266 for the Netherlands, \$360 for New Zealand and only \$137 for China.

### Comments

The low competitive price from China and the absence of the correct varieties in Indonesia, indicate little opportunity to develop a large market, though it should be noted that in the past Indonesia has exported small quantities of potatoes to Hong Kong. There is probably some ability to displace some Taiwanese product in the future as their labor costs continue to rise.

## Tomatoes

### Seasonality

As with potatoes, China is the leading supplier, serving more than 50% of the market in 1993, and shows good consistency in its ability to supply year-round. These are most likely canning varieties, such as Roma, able to withstand rough handling.

The second leading supplier is Australia, exporting more than 100 tons per month every month except January and February.

Taiwan and Thailand are only sporadic suppliers, and have no supplies on offer for more than one half of the year.

There are distinct import peaks in April, July and August, the latter coinciding with the hot summer months and the consumption of more salads and cold meals.

The U.S. is effectively out of the market in the March through June period, and at least in 1993 was again weak in September.

### Market Trends

Imports of tomatoes have exhibited a downward trend over the last several years, decreasing an average of 1,000 tons per year.

Taiwan has exhibited a consistently downward trend, and has gone from being the leading supplier in 1987 to only a minor supplier for the last two years, while Australia has gone from being a minor supplier in 1987 to the second largest supplier currently.

Note that on a price basis, Australia receives almost \$12.17 per kilo, while China receives only \$2.13, reflecting a quality and packaging differential as well as a flavor and varietal differential.

### **Comments**

Since Australia is relatively weak in the January-March period, and the U.S. in the January-June period, Indonesia should strive to develop a Hong Kong market for superior quality tomatoes in this "off season" time frame. These would be high quality tomatoes, probably of a Beefsteak variety, prepacked and airfreighted, and oriented to the hotel/restaurant and supermarket segments.

## **Onions and Shallots**

### **Seasonality**

New Zealand is the leading supplier of onions and shallots, accounting for almost one third of the market, followed closely by the U.S. and at some distance by China.

This market shows marked peaks and troughs probably reflecting both the storability of onions and the accompanying variability and volatility of prices as various supplying countries harvest come onto the market. Note that in any one month generally one country accounts for more than one half the import market, and of that countries total exports to Hong Kong, they tend to bunch into a short time period.

### **Market Trends**

For the seven years under study, Hong Kong imports of onions and shallots have been very consistent, at about 15,000 tons per year.

The United States and New Zealand alternate as the number one supplier, and in 1993 New Zealand was the leader, followed by the U.S. and then China.

As can be seen in the following table, however, more than 1600 tons of China's exports were of shallots.

### **Comments**

Indonesia has not been a supplier of onions or shallots to Hong Kong for the past seven years, and with the high degree of specialization and market concentration exhibited by this market, should probably discount this opportunity.

Shallots were formerly classified with garlic, but have been broken out separately for the latest 2 years.

In Chinese cuisine, shallots are thought to have the same effect on the stomach as green onions.

## **Garlic, leeks and other alliaceous vegetables**

This market is totally controlled by China, the world's leading exporter of garlic, and almost half the total imports of Hong Kong arrive in June and July.

The 1993 market was for about 9,000 tons of garlic and 6,000 tons of leeks and other alliaceous vegetables.

Garlic is thought of by the Chinese as a warming food, a tonic for the digestive and respiratory systems, and a vegetable capable of killing bacteria. Its warmth is to stimulate the body, while its pungency aerates and dries; these three characteristics are valuable in the summer when appetites diminish and the body retains fluids. In the Northern parts of China, garlic is thought to be a wormative, and valuable in the treatment of dysentery and pneumonia.

Leeks and other alliaceous vegetables are thought to stimulate digestion, promote the flavor of meat, and when

consumed raw can cleanse the intestines of infections. This category includes Kiangsi scallions, flowering garlic chives, and garlic chives.

Australia, Taiwan and the U.S. furnish about 12300 tons of leeks in the off season.

### **Cabbage and other brassicas**

This is a large category including cabbages, broccoli, kale, kohlrabi, turnips, some radishes and watercress. An attempt has been made to indicate the largest segments of the category in the tables that follow.

#### **Seasonality**

This market tends to peak in the months of October-December and in May-July coinciding with the cold and hot seasons in the New Territories, and thus reduced local supplies. More than 60% of Hong Kong's imports come from China, with significant amounts also from Australia and the U.S.. As will be seen below, this market consists of more than six different types of cabbages and other brassicas, and the overall import seasonality may reflect the availability of the different types.

Indonesia supplied more than 1,000 tons of cabbage in the period May-October, 1993, and it would appear that if a more consistent supply availability could be worked out there would be a market opportunity. There would also appear to be an opportunity to seize some of Taiwan's market share in the early months of the year.

#### **Market trends**

##### Round cabbage

Of the 1,150 tons of cabbage supplied by Indonesia to Hong Kong in 1993, 100% was of this variety, and Indonesia has shown a consistently upward trend in supplying this market, with the exception of 1991.

The market is relatively stable, at around 10,000 tons per year, though there was an apparent shortage of Chinese crop in 1987. China is the leading supplier, with more than 50% of the market, followed by the U.S., Australia and Indonesia. Note that Singapore shipped an additional 454 tons - probably of Indonesian origin. On a price basis, however, the U.S. receives \$4.95 per kilo, Australia \$6.05, China \$1.84 and Indonesia \$2.60, reflecting a quality and packaging differential and an apparent inability to ship in the period November through April.

While traditional cooks regard this as foreigners' food, its comparatively low price year-round and its consistent availability have forced its acceptance in the bulk of the marketplace. To develop this business, Indonesia must lengthen its growing season to extend through as much of the year as possible, develop the ability to deliver cabbage with core temperatures reduced to the minimum recommended levels as soon as possible after harvest, and develop cold chain capabilities.

##### Tientsin Cabbage

This cabbage is known by many names - Peking, Shantung, celery cabbage, Tientsin nappa chou de Chine and pe-tsai, perhaps alluding to its universal popularity.

With annual volumes of 8,000 tons, this is a market that Indonesia shipped small amounts to in 1988-1990, proving that it could produce the crop, and significant amounts of this type of cabbage have been observed throughout Indonesia.

The market is dominated by China, with about 5,000 tons per year, but Australia also manages to ship 2,000 tons per year at a value exceeding that of the Chinese exports. As with round cabbage, Indonesia will have to develop the necessary infrastructure to market significant quantities of this crop in Hong Kong.

##### Chinese kale

This is a small market, completely dominated by Chinese producers. Chinese kale, or gai lan, is probably not suitable for transport over long distances. Kale is considered more cooling and harsh to the stomach than other cabbages and thus is often accompanied by a rich sauce as a counter balance.

### Chinese white cabbage

This is a variable market that averages about 4,000 tons per year depending on availability from Taiwan and China, though some supplies enter from Australia and Japan. This is also known as paksoi or baak choi. The fact that Australia has successfully developed a market for a few hundred tons per year should indicate that Indonesia can have the same capability, given the infrastructure and transport availability and costs, since Indonesia is comparatively closer.

### **Other edible brassicas** Chinese flowering cabbage

Also known as choi sum or flowering pak choi, this is included in the "other edible brassicas" table which follows. This table also includes mustard cabbage, gai choi, and Chinese flat cabbage as well as watercress and kohlrabi. China is the main source of supply, though there are developing shipments from Australia.

### Cauliflower and Broccoli

No data was available on seasonality. These vegetables have only been reported separately for the past 2 years, and the data is presented in the attached table. Note that the U.S. and Australia dominate the market and that both have approximately equal shares. Both these vegetables can be produced in Indonesia but require the presence of a complete cold chain from point of harvest to point of consumption if they are to arrive in the market in suitable condition.

## **Lettuce and chicory**

This market is completely dominated by the U.S., and is made up largely of iceberg type lettuce, delivered by sea.

Note the sharp peaks in June-September, coinciding with the hot months in Hong Kong and the increased consumption of salads and cold meals. Chinese think lettuce is a cooling vegetable that can relieve stomach heat, but which if eaten to excess can attack the liver. Thus it is appropriate for serving in hot weather or as an accompaniment to "heating" foods. Additionally, the Chinese word for lettuce is also the same as for money, depending on pronunciation, and is thus served as an "auspicious" vegetable on birthdays, New Years, etc.

### **Market trends**

#### Head lettuce

The lettuce market is overwhelmingly dominated by head lettuce, which accounted for 21,000 tons of the total market for lettuce and chicory of 22, 519 tons. Also note that the market, following significant annual gains in the period 1987-1990, has since stabilized at about the 21,000 ton level.

The U.S., as mentioned, has completely dominated the market, though there was an attempt by Australia to gain market share in 1990 and 1991.

#### Other lettuce

As mentioned above this is small market, consisting of about 1,000 tons per year of various specialty lettuces, and is not detailed separately.

## **Carrots, turnips, beetroot, etc.**

### **Seasonality**

This is normally a 2,500 - 3,000 ton a month market with the exception of December and January. Taiwan dominates this market, followed by China and Australia.

More than 60% of Hong Kong's imports of these vegetables originate in Taiwan. As Taiwan is becoming increasingly industrialized, urbanized and labor costs are rapidly increasing, it would be expected that Indonesia would have a distinct labor advantage in these crops.

### **Market Trends**

### Carrots

Carrots make up more than 75% of this overall category, accounting in 1993 for more than 24 thousand tons of imports into Hong Kong. Taiwan has almost 80% of the Hong Kong carrot market, followed by Australia with 14%. Thus Taiwan is to the Hong Kong carrot market what Australia is to the Singapore carrot market - they dominate the market for no apparent reason. For Indonesia to compete in this market will require either year-round availability or lower transport rates than the competition, or both.

### Turnips

Turnips accounted for only 4,000 tons of volume in 1993 and the market was overwhelmingly Chinese.

### Beets, salsify, celeriac, radishes and edible roots

This subcategory amounted to 3,500 tons, and as with the above was dominated by China.

### Hairy Gourd

This is a small market generally of 1,000-2,000 tons, though increasing to almost 3,000 tons in 1993. The market is supplied almost entirely by China. Note that Taiwan, formerly a supplier, has effectively withdrawn from the market, which may open a small opportunity for Indonesia.

### Chinese turnip

Chinese turnip, or daikon to the Japanese, is a radish type vegetable with an annual import market of some 8,000 tons, depending on local production. Since 1991, it has been sourced almost exclusively from China, but imports have been decreasing indicating that China may not be offering sufficient supplies.

## **Cucumbers and gherkins**

### **Seasonality**

As would be expected, imports of cucumbers and gherkins peak in the period May through August, when Hong Kong temperatures also peak. Many of the cucumbers imported from China are of the yellow variety, considered particularly effective in helping the body cope with dry weather by moisturizing the lungs.

### **Market trends**

China is virtually the only supplier of cucumbers and gherkins.

## **Fruited Vegetables and Legumes**

This category includes soy beans and sprouts, jicama, mung beans, peas and peapods, kudzu and long beans.

### **Seasonality**

China is the leading supplier, accounting for almost 90% of the imports of Hong Kong, and no country accounts for as much as the lowest month for China, with the exception for a one-month period (April) when Thailand slightly outsells China.

Note that more than 50% of these imports occur in November and December, and that 80% of the imports are accounted for by the months of October-January, indicating a "warming or hot" food.

### **Market trends**

### Peas

Peas are the dominant factor in this category of Hong Kong's imports, and amounted to 56% of the category. Peas also represented 85% of Hong Kong's imports from the U.S. in this category. It is thought that while edible snow pea pods are the quintessential Chinese food, they actually originated in Holland, and thus the Cantonese name hoh laan.

Note that despite long distances Zimbabwe managed to export 88 tons of peas to Hong Kong in 1993, while with much shorter distances Indonesia exported 2 tons. It is almost certain that the Zimbabwe exports were snow peas, which are also produced in Indonesia.

### Beans

Much less important to the import trade than peas, 1993 imports of beans amounted to only 482 tons, the majority of which was from China and which probably was primarily long beans.

### **Other leguminous vegetables**

This sub-category, again dominated by China, with 80% of the imports into Hong Kong, also registered 481 tons of imports from Thailand, but only 3 from Indonesia.

### **Mushrooms and truffles**

This category consists of button or field mushrooms, wood ear, winter, silver wood ear and straw mushrooms. The only sub-category available from statistical sources is for straw mushrooms. Since all fresh mushrooms do not travel well, and have very limited shelf lives, this is not a likely area for Indonesian export growth.

### Seasonality

As would be expected, China is the major supplier of mushrooms to the Hong Kong market, accounting for 73% of the market.

Note however that from May-September, Chinese shipments drop significantly, as does total mushroom consumption.

Peak consumption periods are in the months December through March

Australian shipments of agaricus mushrooms are fairly consistent, except for the months of February, March and April.

### **Market trends**

#### Mushrooms other than straw

Mushrooms other than straw mushrooms have shown strong growth since 1987, when recorded imports were only 600 tons. In 1993, current import levels are 2,701 tons, and China has about 70% of the import market. Taiwan has also shown fairly consistent growth as a supplier to this market, and is the second leading supplier.

In the past two years Australia has also emerged as a supplier of mushrooms to the Hong Kong market, probably by taking advantage of extremely low freight rates out of both Perth and Sydney.

#### Straw mushrooms

Straw mushrooms account for a little over 20% of Hong Kong's total mushroom imports, and China has 90% of the market. Chinese nutritionists consider straw mushrooms a cooling vegetable with the capability of reducing blood fat.

### **Other Vegetables**

This category includes a variety of fresh vegetables such as artichokes, asparagus, celery, etc. and averages about seven thousand tons per month. The market is dominated by China, with 77% of the market, followed by the U.S. with 11%.

## Seasonality

This market shows two distinct peaks - one to coincide with the Christmas holidays and the other to coincide with the Chinese New Year. Those two months account for more than 20% of Hong Kong's annual imports.

## Market trends

### Artichokes

A vegetable virtually unknown to the Chinese, it is assumed that Hong Kong's total imports of 10 tons were all from the U.S..

### Asparagus

Hong Kong's imports of asparagus are dominated by the U.S., with almost 50% of the market in volume, and more than 60% by value. Australia is the second leading supplier with almost 25% of the market. The Chinese and Thai supplies are of a much thinner tropical variety.

Both varieties have been observed in Indonesia, but the domestic market seems to absorb all available supplies, with small amounts processed.

Eggplant In Chinese cuisine, eggplant is characterized as either hot or cold depending on the cooking method used. As this is a locally produced vegetable, there is little requirement for imports.

### Celery

Accounting for 12% of the total imports of other vegetables, celery is reputed to have a powerful calming effect on the liver, and is used as a home remedy for lowering cholesterol and blood pressure. It is especially consumed during the New Year Lunar celebrations and is associated with diligence, the strength to work hard, and when consumed with a particular seaweed (faat choi) is said to bring ever increasing wealth.

There are two varieties, Asian and Euro-American, apparently from the same species. Hong Kong Cantonese have generally learned to prefer the Euro-American as it is blander, more tender and more widely available.

The 1993 import market for celery was 10,600 tons, and 85% of this market was held by the U.S., and almost 10% by Australia, indicating a possibility of off season production and export by Indonesia.

### Bell pepper

This is a relatively small but pricey market. The peppers from Belgium tend to be the yellow, orange, red, and purple types used for garnish and are priced accordingly. Note that Belgium receives an average of HK \$23,728 per ton, Australia HK\$ 14,819 and China HK\$3139. All types of bell peppers can be produced in Indonesia. Bell peppers are not a traditional Chinese food, but are growing in popularity, especially as they are enjoying increasing frequency of use in the restaurant trade, which will lead to adoption for home use.

### Peppers, not sweet

Indonesia is the second leading supplier in this category, providing 69 tons in 1992 and 57 tons in 1993. Thailand is furnishing more substantial amounts at a significantly lower price.

While it is reported that the Hunanese can live without meat but not without peppers, the Cantonese of Hong Kong view chille as hot. In small amounts, they are taken as a general stimulant and as a combatative to the heat of summer.

### Spinach

This is a relatively minor crop, accounting for only 242 tons of volume in 1993. Water chestnut

The market for this swamp grown crop is controlled by the Chinese. Consumers think of water chestnuts first as a



tonic and only secondarily as a vegetable. They are perceived as a cooling influence

#### Other Vegetables, NES

This is a catch-all category.

#### Ginger

While not strictly a fresh fruit or vegetable, the authors have elected to include ginger here as it is perceived and treated by exporters, the trade and consumers, as a fresh food, and is marketed through the same channels. It is also a major item of trade for Indonesian exporters to Hong Kong, and accounted for 4,807 tons in 1993, with a value of more than HK\$ 14 million. Note that while Indonesia has almost 45% of the Hong Kong volume, it has less than 35% of the import value, implying that it is perceived as being of lower quality. Ginger is an essential ingredient in Chinese cooking and is perceived as a stimulant. Chinese cooks rely on ginger to kill offensive odors, intensify pungent flavors, and disperse cold - both the common cold and the "cold" that comes from cooling ingredients used in cooking. Ginger has been proven clinically effective in alleviating nausea caused by motion sickness, surgery and food poisoning.

### **NOTES ON FRUIT IMPORTS**

#### **Oranges**

##### Seasonality

The Hong Kong market for oranges is dominated by one country - the United States, and essentially by one marketing cooperative, Sunkist.

China is a significant supplier only in December and January, which is when Egypt and South Africa move their biggest volumes.

Consumption of oranges in China peaked in January at more than 22,000 tons, with almost one half of that volume coming from the United States. Imports generally peak just before the start of the New Year, when a gift of oranges is associated with good fortune for the coming year.

##### Market Trends

The 1993 market for oranges was 182,000 tons, down from the peak of 1987, but significantly improved over the 1991 market of 100,000 tons caused by a shortfall in the U.S. crop. The U.S. had a market share of almost 75%, followed by South Africa which made a sudden leap into second place with a share of 11%. This share has been rapidly increasing over the past 4 years. Another notable newcomer is Egypt which for the preceding two years has managed to move more than 5.5 million pounds per year.

#### **Mandarins and Tangerines**

##### Seasonality

As with oranges, and for similar reasons, imports peak in January, when more than one-third of the years' total imports move through the market.

China is the major supplier, accounting for more than 70% of the market, with most of the remainder coming from Taiwan.

##### Market trends

Imports of mandarins and tangerines peaked in 1992 (probably reflecting the 1991-2 shortage of oranges and substitution of mandarins for high priced oranges) before returning to their more normal levels in 1993. As would be expected China is the leading supplier, and their market share and production have been increasing. Taiwan is the second largest supplier generally but shipped no fruit in 1993.

##### Comments

The exports shown from Singapore might be either Malaysian or Indonesian fruit. Indonesian exporters need to degreen their fruit with ethylene if they are to receive fair value in relation to the competition. This category also includes Clementines and Wilkins, both of which account for a very small portion of the market and which are not detailed separately.

### **Lemons and Limes**

#### Seasonality

Imports of lemons and limes, as would be expected, peak in the hot months of July, August and September. Note, however, that these months do not coincide with peak shipments from the leading supplier, the U.S., which accounts for 75% of Hong Kong's imports of lemons and limes. This indicates that the U.S. is running production counter cyclical to the market demand, as verified by the fact that Australia's shipments peak during these same months.

#### Market trends

In the attached table please note that lemons were reported separately up to 1991, limes were added to the category in 1992, and probably account for the bulk of the increase in the category in 1992 and 1993. The U.S. has always been the leading supplier to this market, with most of the fruit being marketed through the Sunkist cooperative. South Africa has traditionally been the number two supplier, while Australia has exhibited strong growth, shipping more than 1,000 tons per year in the last three years. It is expected that Australia and South Africa will continue to erode U.S. market share in the near term. Australia would appear to have an advantage of greater year-round availability.

Note that with the identification of what appears to be a 2,000 ton per year lime market in Hong Kong, there would appear to be an opportunity for an Indonesian exporter to commence exploratory shipments of limes to that market.

### **Grapefruit**

#### Seasonality

This is an unstable market, as indicated by peak imports in September, January, and February. Grapefruit is not favored by Chinese consumers, and thus is relatively unimportant in fruit trade.

The leading supplier is Thailand, but note that more than 50% of that country's exports occurred in one month - February. The second leading supplier is China which also has a one month main "season," shipping almost one half its' annual exports to Hong Kong in January.

#### Market trends

This is a market exhibiting only sporadic growth. Note that China has only recently become a major supplier to this market, and in 1992 was the leading supplier followed by Thailand and the U.S..

#### Comments

This is a rather small market serviced by entrenched suppliers, with China "buying" its' share based on low price. It is unlikely that Indonesian fruit could compete.

### **Citrus Fruit, NES**

This market is dominated by Thailand and in only one month - September. The category includes kumquat, bergamot and citrons.

### **Bananas**

Banana imports are consistently in the 3,000-4,000 ton per month range, except for January.

The Philippines is the leading supplier, with 79% of the market, and supplies almost exclusively the giant Cavendish variety.

Thailand is a consistent supplier of specialty bananas year-round, while Indonesia is apparently unable to supply this market in January, February and April.

Indonesia's recent entry into this commodity category coincided with a downturn in shipments of fruit from Malaysia, and may indicate Indonesia has a long-term potential in the specialty banana business in Hong Kong. It may also reflect the commencement of shipments from the Del Monte operation in Lampung or the PT SMART (Sinar Mas) operations on Kalimantan.

### **Apples**

#### Seasonality

After oranges, apples are the second biggest import on a weight basis into Hong Kong, and this market is also dominated by the United States, with 71% of the market. The domination of the market by the U.S. is largely the result of promotional campaigns, especially those run by the Washington State Apple Commission.

Chile and New Zealand are major suppliers in April through August.

#### Market Trends

Apple consumption has also doubled in Hong Kong in the past seven years, to a current level of 80,000 tons, and the U.S. has more than a 70% share of this business. Chile, South Africa and New Zealand were also significant suppliers in 1993, followed by Canada and Australia.

### **Grapes**

Fresh grape imports peaked in Hong Kong in 1993 in March, September and October. The March peak was caused by record shipment of more than 5,400 tons from Chile, a relatively new supplier, while the September-October peak was caused by the traditional supplier, the U.S.. The United States accounted for 64% of Hong Kong's grape imports.

Note that grape imports are very low in the summer months, surprising in view of the fact that grapes are a "cooling" fruit.

#### Market Trends

The market for grapes shows consistent growth and has doubled in the last six years. The U.S. is the dominant supplier, followed by the contra-seasonal producers of Chile and Australia.

#### Comments

An improvement in locally grown grape cultivars could result in the establishment of an Indonesian grape industry. India recently completed such a program and is now exporting grapes to Europe and Singapore.

### **Figs**

The fig market is essentially dominated by the U.S. producers, who in 1993 had a market share of 96%. Imports peak in the Sept-December period, when the crop becomes available in the U.S..

The market has grown significantly over the past seven years, but still amounts to only 25 million HK\$ in value. The U.S. and China have been the only consistent year to year suppliers, though Malaysia has been a market presence for five of those years.

### **Coconuts**

Fresh coconuts are a year-round commodity in Hong Kong, but displayed a marked increase in imports in August, as both Thailand and Malaysia, the leading suppliers, shipped increased amounts. The coconuts coming from Singapore may be either Malaysian or Indonesian, most likely the latter, as Indonesian exports of coconuts to Singapore increased markedly in 1993, to a level of almost 20,000 tons.

### Melons and Papayas

June, July and August are the peak consumption months for melons and papaya. Note however, that Taiwan ships a significant amount in June, when melons are not available in quantity in the U.S.. China, Malaysia and Singapore are the dominant suppliers, but as was noted in the Singapore report there is a significant quantity of Malaysian watermelon that is re-exported to Hong Kong.

Note that China has only a four-month season in which it moves the bulk of its fruit, while Australia has developed a market for cantaloupe ("rockmelon") and honeydew melon.

#### Market trends

##### Melons

The sudden increase in the total melon volume is caused by the collapsing of several different types of melons into a single category in 1992, so that the category now includes winter melon, etc.

Watermelons were reported separately prior to that year, and thus the true watermelon volume is about 20,000 tons per year. Based on prior years' trends, it is apparent that China dominates the market for this low value fruit.

##### Honeydews and Cantaloupes

For 1992, we were able to obtain a breakdown of the various types of melons, and as can be seen on the attached chart, the exact breakdown was 23,901 tons of honeydew, cantaloupe and muskmelons, and they were sourced principally from the U.S., China, and Australia. The U.S. melon tends to be honeydew (due to the long shipping time) the Australian cantaloupe (often by air) and the Chinese melons are specialties such as the Hami. Note that Indonesia shipped 34 tons of these types of melon to Hong Kong in 1992

##### Other melons

Australia shipped 140 tons of "other melons" in 1992 but it is not known what varieties these were.

##### Papayas

Papaya has shown remarkable growth over the past seven years, with imports increasing from a level of 4,750 tons in 1987 to more than 134,000 tons in 1993. The majority of this growth has been accounted for by West Malaysia, and is most likely due to the increasing commercial success of the Malaysian developed Papaya Exotica, a cross between an indigenous variety and the Hawaiian Solo. The Exotica is a small fruit suitable for easy portion control in restaurants, since one-half a fruit constitutes one serving.

##### Comments

Indonesia should develop a similar variety. The larger Papaya Bangkok and other local varieties are too large for the typical Hong Kong household, though may be suitable for the juice shop trade discussed earlier.

### Pears and Quinces

Pear and quince imports peak in the months of September and October, when Chinese fruit becomes available.

China controls 73% of this market, but note that Chile, South Africa and Australia have all developed counter-seasonal production.

Japan's shipments are of a specialty pear, unique to that country.

The U.S., Australia, Chile and South Africa all seem to have developed specialty market niches of some magnitude - note that there is a distinct difference in the organoleptic qualities of their fruits, with U.S. pears tending to be much softer and blander, while the Australian fruit is more crisp.

### **Apricots, Cherries, Peaches, Plums and Sloes**

This category consists of disparate fruits, but is dominated by the U.S. during the hot months of June-September, and by Australia during their off-season production months of December through March. Note that during peak consumption months, the U.S. is virtually the only market entry.

Apricots are a minor item in Hong Kong's imports and the trade is dominated by Australia.

Cherries accounted for almost 20% of this subcategory, and the U.S. accounted for 92% of Hong Kong 1993 imports of cherries.

Peaches (this category also includes nectarines) accounted for 18% of the 1993 volume for this category. The U.S. accounted for 75% of Hong Kong's peach imports.

Plums accounted for 60% of this category volume in 1993 and are the dominant factor.

The United States and Australia dominate the plum subcategory, with the U.S. having the major market share at almost 74% of the total plum imports. This is a market which has shown neither dynamic growth nor stagnation in the past seven years. There is some evidence that given a shortfall in either U.S. or Australian crops, the other will jump in and attempt to gain market share, but this could also be caused by the use of Hong Kong as a dumping market when there is a crop surplus.

### **Berries**

This category consists of strawberries, raspberries, blackberries, mulberries, loganberries, cranberries, blueberries, etc.

Australia and the U.S. are the leading suppliers of berries to Hong Kong, with the bulk of the business being strawberries. The U.S. leads the market during the hot months, while Australia tends to ship at peak rates in October-November. Australia and the U.S. are also the only suppliers with year-round availability.

Berries from the Emirates are only available during the winter, as the remainder of the year is too hot for production.

Market trends

Strawberries

Strawberries account for 80% of the berries imported to Hong Kong, and the U.S. accounts for just over 50% of the total Hong Kong strawberry volume. Australia is the second leading supplier, with just under 50% of the volume.

Note that the U.S. and Australia are the only two countries able to supply the market consistently on a year-round basis with fruit.

Emirates fruit, available only in the cold winter months in the desert, and produced at uneconomic rates, is sold at a price discount during its seasonal availability.

Raspberries, blackberries, mulberries and loganberries

This portion of the berry market is dominated by Australia and by the shipment of raspberries, an extremely expensive and perishable product. Trial raspberry production is about to be attempted in Bali.

Cranberries and blueberries

This niche is really a two-tiered market - cranberries from the U.S. for holiday celebrations for U.S. citizens resident in Hong Kong and shipments of blueberries from both the U.S. and Australia.

### **Pineapples**

The Philippines dominates the pineapple market, with 97% share. This is Smooth Cayenne pineapple grown and marketed by Dole and Del Monte on Mindanao and transported and marketed along with their Cavendish bananas.

Note that this market peaked in 1989 and 1990 at levels of about 8,000 tons, and volume has since decreased to just above 4,000 tons. This indicates a capacity of the market to absorb additional quantities of fruit, though probably at much lower prices.

Malaysia has managed to ship 23,000 tons of fruit into Hong Kong in the past two years and this is surprising since most Malaysian fruit is of the Singapore Red/Spanish Queen variety, and generally unacceptable for fresh consumption.

The South African fruit noted on the market in the past two years is most likely promotional fruit being shipped in with other cargo, and sold at a loss on the market to build share.

The Philippines appears to have a lack of fruit in June and this should be an initial target for Indonesian fruit, followed by January and November.

Note that there has been no U.S. fruit in the market since 1990.

### **Dates**

China has 98% of the date market, and it appears that the market is solely dependent on the monthly availability of that fruit.

Malaysia, Singapore and the U.S. all have small speciality markets for dates, and the U.S. market share is probably for a fancy pack, while Singapore's exports are a transshipment.

Dried dates have not been listed separately as they amount to less than three tons per year.

### **Avocados, Mangoes, Guavas and Mangosteens**

Again, a disparate group of fruits, with a marked peak in March-May, when Philippine mangoes are in season. The Philippines has 71% of this market, with Thailand a distant second, the latter probably shipping "honey mangoes."

#### **Market trends**

##### **Avocados**

The avocado is not well known in Hong Kong and needs to be promoted more. A shortfall in the 1992 crop in the U.S. caused diversion of fruit to the European market, where prices were better, and Australia seized the opportunity to corner additional market share.

##### **Guavas**

In 1993, Thailand dominated the guava market, accounting for 83% of the dollar volume.

##### **Mangoes**

Hong Kong accounted for almost 28,000 tons of mango imports in 1993, and almost 80% of that volume was accounted for by the Philippines. This reflects a varietal preference for Philippine mangoes, and, more importantly, the fact that there is year-round availability. Indonesia accounted for less than 1% of the volume, but note that Indonesia mangoes fetched an average of \$19.47 per kilo as compared to \$6.64 for Philippines fruit. Thailand has become the second leading supplier to Hong Kong, usurping the title from Australia.

##### **Mangosteens**

The mangosteen market, while much smaller than the mango market represented a better opportunity for Indonesia and in 1993, the country exported 52 tons to Hong Kong. Thailand, on the other hand did 36 times the volume, and

both Malaysia and Singapore outperformed Indonesia in mangosteen imports into Hong Kong.

### Other fresh fruit

This category includes lychees, longans, durians and other fresh fruits. For lychees, longan and durian, the authors were able to obtain some information on the relative size of each of these sub-categories.

#### Lychees

This is a fruit whose market size is dependent on the supplies of the two leading producers, Taiwan and China. A shortfall of production in either of these 2 countries reduces the total market accordingly. Lychees, however, account for only 8% of the total volume of this category.

Note both the extremely high prices and the fact that Thailand is rapidly developing as a source of supply of lychees for the Hong Kong market. At about HK\$15 per kilo, this is a crop worth the Thai farmers devotion. Trade sources report that Thai lychees have an additional advantage in that they come on the market April through June whereas Chinese and Taiwanese fruit is not available until the Jun-August period.

Australia and South Africa are reportedly also developing lychee orchards. The fruit is highly perishable unless kept under cold chain conditions at all times, and thus the presence of a cold chain system would be a precondition to the development of lychee growing in Indonesia. Preliminary investigations reveal small quantities being produced in Bali and suitable land and agronomic conditions in other locations for the production of lychee.

#### Longan

This fruit is almost as important to the Hong Kong market as durian, with a total import volume of more than 15,000 tons in 1993. As with durian, Thailand is the leading supplier, with 98.7% of the market in 1993. Once again, Indonesia must develop a suitable alternative to the Thai varieties, or develop an "off-season" market.

#### Durian

With imports of more than 16,810 tons in 1993, durians are an important factor in the "all other" category. As would be expected, durian from Thailand dominates the market, with 99.6% of the total imports by volume. Indonesia needs to work on durian with the goal of producing a suitable substitute fruit to the Thai varieties.

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### HONG KONG IMPORTERS OF FRESH FRUITS, VEGETABLES AND NUTS

- 1) FARWEST RESOURCES (HK) LTD.  
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Tel.: (852) 5086965  
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- 2) TIN YAU TRADING CO.  
Wealth Commercial Centre  
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- 3) SEE'S TRADING COMPANY  
Rise Commercial Building,  
4th fl, Room 410  
5-11 Granville Circuit,  
Tsim Sha Tsui, Kowloon,  
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- 4) EUROPEAN ASIAN Co.  
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Mr. Francis Liu (Proprietor)  
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- 5) LORDLY COMPANY LIMITED  
Tonic Industrial Centre  
Block A, 1st Floor, Flat 8  
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- 6) TRANS-OCEAN RESOURCES ENTERPRISE & CO



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7) CHEONG TAI CO.  
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8) PENNELL & Co. Ltd.  
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Tai Po, New Territories,  
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No. of workers/staff in HK: 16 - 25

9) CONTINENTAL ENTERPRISES LIMITED  
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35th Floor,  
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Central Hong Kong

Mr. Allen Andersen (General Manager)  
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Fax: (852) 8611826

Telex: 73483 COGRA HX

No. of workers/staff in HK: 26-50

10) UNICOOPJAPAN (HONG KONG) LIMITED

Shui On Centre

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6-8 Harbour Road

Wanchai

Hong Kong

Mr. Kenny Tsang (Marketing Manager)

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11) MAN HING VEGETABLES FRUITS & PROVISIONS

Hong Kong Plaza

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12) WINSON TRADING COMPANY

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Telex: 65627 WSTCO HX

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13) MAN SHUN CHEONG ENTERPRISES LTD.

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14) TECK SOON HONG LTD.

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Telex: 63738 TESO HX

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Mr. Leu Shu Leung (Managing Director)

Tel.: (852) 8573686

Fax: (852) 8580689

Telex: 71999 LVTRA HX

No. of workers/staff in HK: 16-25

16) ANSOR INTERNATIONAL LTD.

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17) PINE KING INDUSTRIAL LTD.

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18) CIRCLE AND SQUARE LTD.

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21) HOI FAT TRADING CO.  
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22) KK FOOD TRADING CO. LTD.  
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25) PARKSON SUPERSTORE (HK) LTD.  
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26) LONGTRADE PROMOTION LTD.  
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27) KAWO TRADING CO.  
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28) KEE MENG HONG CO LTD.  
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30) SEA ORIENTAL COMPANY LTD.  
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- 32) CONCORDIA CHINA TRADE DEVELOPERS  
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- 33) CREATION DEVELOPMENT CO.  
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- 34) YICK FONG COMPANY  
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42) WAI MING CO.  
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Yaumati,  
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43) WANG FAT HONG  
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44) HOI SANG LOONG FAT KEE

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45) CHEONG TAI CO.  
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Mr. Hung Yim  
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19/F, Hollywood Centre  
233, Hollywood Road  
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Fax: (852) 541-4304

47) TUNG SANG TRADING CO.  
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Yaumati  
Kowloon  
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48) ETAK INTERNATIONAL LTD.  
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- 2) EDWARD KELLER CO, LTD.  
Foods Department  
36/F, Windsor House  
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Fax: (852) 577-1057
  
- 3) MAN SHUN CHEONG  
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No. 199, Wing Lok Street West  
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Fax: (852) 541-5455
  
- 4) SUN WING LEE HING CHAN STORE  
G/F. 42 Wing Lok St. West  
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Fax: (852) 541-1948

- 5) SAVING INTERNATIONAL (HOLDINGS) LTD.  
Rm. 1203, Nandao Com'l Bldg.,  
359-361, Queen's Road, Central  
Hong Kong  
Tel.: (852) 543-3110  
Fax: (852)
- 6) ALBERT WONG & CO.  
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Chung Hing Comercial Bldg.,  
62-63, Connaught Road, Central  
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Tel.: (852) 545-0647  
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- 7) GREAT FAVOUR NUTS & NATIVE PRODUCTS LTD.  
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- 8) SIBER HEGNER MARKETING  
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- 10) JDH TRADING LTD.  
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- 11) OLIVER'S  
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- 12) FAR EAST ASIA STRATEGIC TDG. CO. LTD.  
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489, Hennessy Road, Causeway Bay  
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- 13) ORIENTAL PACIFIC TRADING COMPANY  
9A, Siu On Commercial Bldg,  
245, Des Voeux Road West  
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Fax: (852) 546-4175
- 14) WELLCOME SUPERMARKET LTD.  
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- 15) PARK'N SHOP LTD.  
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1-5, Wo Liu Hang Road  
Fo Tan, Shatin  
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Mr. Steve Winterhalder

Mr. Eric Cheung  
Mr. Timmons Lee  
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- 16) JOYFULL FAIRY LIMITED  
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- 17) THE ASIA PROVISIONS CO, LTD.  
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- 18) LEE'S FOOD MARKETING  
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Tel.: (852) 751-7783  
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- 19) CHUNG KEE CO.  
Flat C, 7/F.,  
European Asian Bank Bldg,  
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21) WOO LEE FRUIT & VEGETABLE CO, LTD.

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22) ENG CHEONG PENG KEE LTD.

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- 25) WIDER TRADING CO.  
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- 26) YAU SHING FRUITS CO.  
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- 29) WING HONG WOO CO.  
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- 31) FOOK FRUITS (KWONG KI) CO, LTD.  
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- 32) KINONG CO. LTD.  
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- 33) WING KEE  
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- 34) SUNHARVEST LIMITED  
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- 35) HAPPY NICE LTD.  
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- 36) SCHOLFIELDS TRADING LTD.  
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- 37) TOP EXPECT CO, LTD.  
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38) YEE LI TRADING CO.  
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