

# Exploring International Export Markets

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Export-curious berry industry members were invited to explore international markets and visit Asia Fruit Logistica in September as part of the Hort Innovation levy funded project 'Multi-industry berry trade development and market access project (2024-2029) (MT23004)'.

Under the guidance of our Head of Trade, Jenny Van de Meeberg, a group of six took up the opportunity to have a first-hand look at what it takes to export berries to international markets; the complexities, challenges and opportunities available and how the different retail landscapes, consumer behaviours and competition from other countries impact Australia's potential export markets for berries.

The six industry delegates were Rebecca Scurr (Piñata Farms), Jason Lin (Hillwood Berries), Blair Greenhalgh (Driscoll's Australia), Tina Slattery (Perfection Fresh), Josh McGuinness (The Berry Collective) and Luke Penza (Fresh Produce Group).

The short but productive 4-day itinerary began in Japan, visiting the Australian Embassy in Tokyo and a broad variety of retail and wholesale outlets. The tour then moved to Hong Kong for a visit to Asia Fruit Logistica and the local retail environment. On their return to Australia, each of the participants were asked to submit a report providing their key learnings from the experience and this article aims to summarise the tour from the participants' perspective.

## Trade Meeting & Market Tour, Japan

Participants gathered in Tokyo on Day 1 for a meeting at the Australian Embassy. The group met with Agriculture Counsellor, Mr James Strachan and Trade and Investment Commissioner & Counsellor (Commercial) for Austrade, Ms Kendall Draper who provided a comprehensive overview of the barriers and opportunities for entry into the Japanese market.

**Some of the key learnings from this meeting, as reported by Jason Lin:**

1. **Branding is essential.** Japanese consumers and retailers are highly sensitive to variety names and brand stories. Simply labelling fruit as "Australian" will not resonate. The brand must emphasise a premium location e.g. Tasmania, plus specific varieties
2. **Transparency builds leverage.** Growers need visibility of the full value chain (FOB → wholesale → retail) to understand where margins are captured and to strengthen future negotiation power
3. **Diplomatic and official platforms matter.** Austrade's support enhances credibility, opens networks, and reduces barriers to entry

The group then spent the remainder of their time in Tokyo exploring retail outlets and wholesale markets. The retail outlets visited ranged from local fruit and vegetable shops and everyday supermarkets through to high end premium food stores and premium fruit gift shops, where fruit is displayed like jewellery in glass counters (with prices to match!).

Both Tina Slattery from Perfection Fresh and Rebecca Scurr from Piñata Farms noted the absence of fresh strawberries in supermarkets. Despite being out of season for Japanese strawberries, Tina expected there would be imports filling the gap and questioned whether limited market access for many countries is the reason for the distinct lack of product. Rebecca suggested that perhaps the Japanese celebrate in season produce, treating strawberry season like Australia treats mango season with very little imported fruit out of season. By example, there were very large, beautiful displays of peaches in every store. Both observations are correct and have an influence on the limited amount of strawberries available during the Japanese strawberry off-season.



**Figure 1. Jenny Van de Meeberg (centre) with Export Tour participants (L-R) Jason Lin, Blair Greenhalgh, Rebecca Scurr and Tina Slattery** Photo credit: Jason Lin



**Figure 2. One of the very few punnets of raspberries found in a supermarket** Photo credit: Rebecca Scurr



**Figure 3. Rebecca Scurr enjoying one of Japan's sweet strawberry delights** Photo credit: Rebecca Scurr



**Figure 4. Premium food outlet in Japan selling luxury fresh fruit dessert items** Photo credit: Jenny Van de Meeberg

Rebecca also noticed that in Japanese supermarkets, fruit and vegetables aren't the first thing you see as you walk in the door – convenience food is! There appears to be a huge market for convenient and healthy ready-to-eat meals which included ready-to-eat fruit in various forms. For Blair Greenhalgh, the retail environments of Japan often felt more organised and quieter, creating a calm shopping experience. In both Japan and Hong Kong, the stores emphasised aesthetic appeal and cleanliness, with displays that were meticulously arranged and visually engaging. He also noted the premium positioning of imported goods, including Australian products, often showcased in dedicated sections with clear labelling around origin and quality.

In the high-end stores and fruit gift shops, great emphasis is placed on presentation, precision and customer experience. Josh McGuinness from The Berry Collective noted standout examples such as individual gift boxes and multi-tier presentation packs for premium grapes, strawberries, and melons featuring minimalist design, soft-touch materials, and elegant typography. The product screams luxury and gives the impression of a high-end confectionery or jewellery-style product. Some brands have incorporated QR codes or story cards linking to grower stories or harvest videos, creating a sense of authenticity and emotional connection.



**Figure 5. A classic gift box including melon, orange, peach and grapefruit, representing abundance and luxury (with a price tag of close to AU\$300!)** Photo credit: Jason Lin



**Figure 6. An example of a premium fruit gift shop** Photo credit: Jason Lin



**Figure 7. A story card provides greater connection with the product**  
Photo credit: Josh McGuinness



**Figure 8. Strawberry variety chart in Japanese store**  
Photo credit: Jenny Van de Meeberg

Blair was surprised at the depth of information available to consumers at the point of sale, especially with regard to locally produced fruit. It was common to see detailed labels that included the farm name, fruit size, sugar content (brix level), age of the produce, and even the grower's history.

Equally impressive was the general knowledge Japanese consumers had about the fruit they were purchasing. Shoppers seemed well informed and engaged, often choosing produce based on specific attributes like brix level or region of origin. This reflects a culture that values quality and informed decision making.

The Tsukiji Outer Market, known as Japan’s “Food Town,” is a bustling maze of narrow alleys and open streets lined with fruit vendors, seafood stalls, sweet shops, and a mix of wholesale and retail outlets offering fresh produce and traditional Japanese foods. Jason reported that fruit prices at the market were significantly lower compared to department stores, and displays were neat but not as perfectly curated. A pack of Hokkaido strawberries was purchased for approx. AUD\$13. The strawberries had a strong fragrance but were surprisingly sour, highlighting the seasonal and regional differences in taste profiles.

Jason added that sweet strawberry products were a significant highlight in Tokyo. Strawberry Mania is a chain of strawberry-themed cafes and shops in Tokyo that sells a vast array of strawberry delights such as Daifuku (a Japanese sweet), tanghulu (candied fruit on a stick), smoothies and soft serve ice cream. These offerings show the cultural importance of strawberries beyond fresh fruit, extending into desserts and experiential food products. Rebecca noted that the tanghulu used frozen strawberries and the strawberry fruit used in the sweet creations was sourced from the Netherlands.



**Figure 9. The Hokkaido strawberries pack was labelled clearly with '北海道産' (Hokkaido origin), emphasising regional branding, one of the key takeaways from the meeting at the Australian Embassy** Photo credit: Jason Lin



**Figure 10. Strawberry Mania is a specialty strawberry sweets store in Japan** Photo credit: Jenny Van de Meeberg

Ota Market is Japan's largest wholesale fruit and vegetable market, acting as a key hub for distribution and product pricing. It operates under a system of wholesalers, intermediaries and authorised buyers. Daily auctions set reference prices that influence retail and food service markets across Japan.



**Figure 11. Ota Market wholesale hall** Photo credit: Jason Lin



**Figure 12. Intermediaries bidding at auction at Ota Market** Photo credit: Jason Lin

The products are displayed in lots, labelled with origin and grade and inspected by buyers. Auctions are then conducted in rapid, rhythmic style by licensed auctioneers with intermediaries raising hands or using gestures to bid. Winning bids are instantly confirmed and documented, and products are quickly dispatched using turret trucks and other logistics vehicles.

In his report, Jason highlighted that Ota Market is critical for accessing Japan's mainstream distribution channels, and price positioning impacts supermarket and restaurant pricing nationwide. To succeed, berry exporters should partner with trusted intermediaries, balancing premium branding for high-end markets with competitive positioning in wholesale distribution.

## Asia Fruit Logistica & Market Tour, Hong Kong

Day 3 of the tour was spent at Asia Fruit Logistica which is held at AsiaWorld-Expo next to Hong Kong International Airport.

Asia Fruit Logistica is the leading international trade show for Asia's fresh produce business, covering the entire value chain from production to retail. It serves as a platform for networking, business development, and gathering market intelligence, featuring exhibitors, product launches, and the Asiafruit Knowledge Centre with congresses and forums on industry trends and innovations.

The event features 760+ exhibitors from 43 countries and regions plus around 26 national and regional pavilions, and it welcomes over 14,000 buyers and trade visitors from all over the world.

The group spent the morning exploring the show, keeping an eye out for fresh ideas in marketing and packaging. One brand that stood out was Zespri™, whose clever, localised campaigns had clearly made an impact in Japan too. Using collectible figurines, Zespri has turned kiwifruit into a cultural moment. As Tina observed, with the current “Labubu” craze sweeping Asia, consumers love the thrill of collecting limited-edition items and Zespri has nailed this trend, turning fun merchandising into a powerful driver of sales.

According to Rebecca, Zespri was also the only notable brand in any Japanese retail outlet and their presence at Asia Fruit Logistica was unmatched, being the largest and most interactive exhibitor.



**Figure 13. The full group at Asia Fruit Logistica (L-R) Josh McGuinness (The Berry Collective), Luke Penza (Fresh Produce Group), Jason Lin (Hillwood Berries), Tina Slattery (Perfection Fresh), Rebecca Scurr (Piñata Farms), Jenny Van de Meeberg (Berries Australia Head of Trade), Blair Greenhalgh (Driscoll's Australia) and Jesse White (Berries Australia GM Asia)** Photo credit: Jenny Van de Meeberg



**Figure 14. Novel but effective marketing with collectable figurines** Photo credit: Rebecca Scurr

Following Asia Fruit Logistica, the group hit the streets of Hong Kong to review the retail landscape, from wholesale markets to mainstream supermarket chains and premium grocers.

Supermarkets in Hong Kong felt more familiar to Australian visitors, with fresh produce displayed front and centre as you walk through the doors. However, unlike Australian stores that typically promote bulk buying, retailers in both Japan and Hong Kong focus on smaller portions, eye-catching packaging, and a wide variety of value-added and ready-to-eat products designed for busy, convenience-driven shoppers.

Blair highlighted that the city's role as a global trading hub was evident in the variety of fruits and vegetables on offer from all over the world. There was a wide range of strawberries and raspberries from China, the UK and the USA. However, the strawberries appeared under ripe (white shoulder) and the quality of raspberries from both China and the UK appeared poor compared to Australian standards. No berries purchased were sweet to eat.



**Figure 15. Blueberries merchandised in clear plastic tubes** Photo credit: Josh McGuiness

There was also an abundance of blueberries across all retailers which reflects the open market access. The variety of berries was impressive, with products sourced from all over the globe.

In terms of packaging, Josh noted that the blueberries in Hong Kong were often larger (jumbo size) than those typically available in Australia, and some sold in larger sized plastic containers rather than standard punnets. Tina also noted the tubes and tubs for blueberries, particularly those from Zimbabwe or South Africa.

Premium strawberries from the UK were presented very well in a little tray with individual pockets for each strawberry. The huge volume of plastics being used in fruit and vegetable packaging did not go unnoticed. Josh was amazed by the lack of visible sustainability initiatives in both Japan and Hong Kong.

Luke Penza from Fresh Produce Group also noted the excessive use of plastics, particularly the fruit and vegetables that appear to have been shipped to Hong Kong in bulk and then re-packaged to suit the consumer landscape.



**Coming from Australia - where there is increasing emphasis on recyclable, minimal, or fibre-based packaging - it was striking to see how much single-use plastic and layered wrapping is still used, even for small quantities of fruit. Individual pieces were often wrapped in foam nets, placed in plastic trays, then sealed with film or enclosed in a decorative box.**

Overall, it was observed that the retail environments in both Japan and Hong Kong placed much greater emphasis on presentation, precision, and customer experience than typical Australian fresh produce retailing. Across premium supermarkets, the overall impression was that fresh fruit is treated as a premium, high-care category rather than a commodity, which is reflected in its packaging.

Here are some key market differences identified by Josh McGuinness:

- **Exceptional visual merchandising:** Produce was meticulously arranged, with near-perfect uniformity in size, colour, and alignment. Berries, grapes, and stone fruit were often displayed in small, curated packs or in individually wrapped portions, with labels clearly indicating variety, origin, and, sometimes, the grower's name. In Australia, the goal is to touch the product as little as possible prior to reaching the supermarket or to use the least amount of packaging. This aligns more broadly with Australia's sustainability goals.
- **Premium gifting focus:** In both Japan and Hong Kong, fruit gifting remains a major cultural driver. Dedicated areas showcased luxury fruit boxes (particularly melons, apples and grapes) with elegant packaging, often accompanied by branded ribbons, cushioning, and story cards.
- **Provenance and storytelling:** Signage and digital screens often highlighted origin, seasonal freshness, and grower regions, reinforcing trust and pride in the source. On pack or point of sale QR codes linking to producer videos were common.



**Figure 16. Examples of excessive plastic use: individually wrapped capsicums and a box of figs**

Photos credit: Luke Penza



**Figure 17. Berry fridge display in Hong Kong**

Photo credit: Blair Greenhalgh

## What did the group think of Japan and Hong Kong as export markets for berries?

### Rebecca Scurr, Piñata Farms

*“I didn’t realise quite how ‘easy’ it is to supply into the Hong Kong market. It appears to be a market that is very commoditised. I did not see much genuinely premium fruit on offer. Most berries were definitely not the same quality (eating or appearance) as we have in Australia. I was also told by an importer that the market ‘likes’ strawberries with a white shoulder so there is obviously more weight put on shelf life than eating quality.”*

On the other hand, Rebecca could see a market for premium Tasmanian strawberries in the shoulders of the Japanese season (October / May-June).

*“It may be more difficult to get the Japanese consumer to love raspberries. With extreme care in the supply chain to maintain quality, together with customised branding and packaging solutions for the Japanese consumer, it could be done”, she said. “I believe that with the right strategy, focussed on relationship building and storytelling it could be a very loyal and rewarding market.”*

### Josh McGuinness, The Berry Collective

*“The visit to Japan and Hong Kong highlighted a clear and growing opportunity for Australian fruit in both markets (pending access to Japan for the mainland), particularly in the premium and trusted-origin segments. Australian produce already enjoys a positive reputation for being safe, clean, and high quality. Still, success will depend on how effectively we can differentiate, communicate, and consistently deliver on that promise in markets that value presentation. Countries with lower-cost labour have a distinct advantage in what they can do at scale with novel products, and to be successful in both markets, we need to consider how we can use packaging to communicate the additional value.”*

### Luke Penza, Fresh Produce Group

*“The blueberry market in Hong Kong is extremely competitive with a large variety of brands, countries and pack formats available. Blueberry product from Peru and Zimbabwe was prevalent in retail visits and can be produced at a low cost when compared to Australian product. For Australian blueberries to have a competitive advantage in the Hong Kong market, packaging needs to be bright, inviting and create a sense of prestige when consumers see Australian product on shelves. Australia’s export opportunity is in delivering a consistent, safe and high-quality product in terms of both size and flavour which would encourage repeat purchase. This is what will differentiate Australian produced blueberries to blueberries produced elsewhere.”*

### Tina Slattery, Perfection Fresh

*“For Japan, exports are currently restricted to Tasmania. This makes it essential to highlight origin clearly, positioning the product not just as Australian berries, but specifically as Australian berries from Tasmania. Tasmania already enjoys a strong reputation in Japan for producing premium-quality food, and marketing strategies should leverage this positive perception. However, logistics from Tasmania can be challenging, so a review of supply chain options is necessary to ensure both quality preservation and cost efficiency.”*

*“In Hong Kong, the open market environment creates strong price competition. I observed a significant availability of jumbo-sized blueberries, which appear to be the preferred consumer choice. Strawberries on the other hand were limited, mainly imported from the USA, creating a seasonal window of opportunity for Australian growers. Similarly, raspberries and blackberries were present in smaller volumes, predominantly from China, which also represents a potential opening for Australian produce during this period.”*

### Blair Greenhalgh, Driscoll’s Australia

*“After visiting Japan and Hong Kong, it’s clear that there are strong export opportunities for Australian growers, particularly in premium categories like meat, dairy, citrus, and other fresh produce. Australian products are already well regarded for their high quality, safety, and traceability, which positions them favourably in these markets. However, to grow and sustain success, both individual businesses and the broader industry need to adapt to local market expectations.”*

*“To be successful, Australian growers should focus on understanding and responding to consumer preferences, especially around packaging, portion sizes, and presentation. In Japan for example, minimalistic design and individually wrapped items are common, reflecting cultural values around cleanliness, convenience and aesthetics. Hong Kong consumers also value premium presentation and efficient retail experiences.”*

All participants agreed the tour was an invaluable opportunity to better understand key export markets, from retail trends and consumer preferences to the importance of strong relationships, supply chain dynamics, and emerging opportunities. Experiencing these elements firsthand offered a rare and practical perspective on the many factors that shape international trade and the future of Australian berry exports.

As Blair Greenhalgh noted, “Delegates who participate in these tours return with fresh insights and renewed motivation, which will inspire and lead the growth and innovation required to develop a targeted strategic plan in these markets.”

