



# VG13048 - HAL PROJECT Market Analysis and Strategy: Broccoli to Japan

# Introduction

- Overview of project
- Project Objectives/Outcomes
- Project Activities
- Who are the project team members?
- What do we aim to achieve today?
- Acknowledgements



# Introduction



## Overview of project

- Domestic and Export Market Access and Trade Viability Issues – A Strategy to Address – Michael Clarke, AgEconPlus
- HAL Tender
- GMI Singapore to Broccoli project



# Introduction

## **Stage 1 – Market analysis and strategy (Objectives/Outcomes):**

Produce an in-depth analysis of the broccoli market in Japan and pending IAC endorsement develop a three year export investment strategy to develop broccoli exports to Japan.

1. Work in a collaborative partnership with vegetable levy payers and exporters to direct and oversight the project activities and actively participate in the in-market activities.
2. Conduct desktop research to determine market demand, competitors, market access, barriers to entry and foodservice, retail and consumer trends.
3. Map the supply chains from growers to the final consumer for imported broccoli to gain knowledge of market specifications, develop relationships and document costs.
4. Conduct consumer research in Japan to assess consumption habits, demographics, usage and attitudes to imported broccoli.
5. Undertake an economic analysis to evaluate the costs of exporting from farm gate to market including a return on investment.
6. Develop and implement an extension and communication plan throughout the project and collaborate with existing HAL projects.

## **Stage 2 – Pending interim report**

1. Develop a three year Market Development Investment Program for broccoli exports to Japan.
2. Prepare new project to implement the Market Development Investment Program



# Introduction

## **Project Activities:**

- Desktop Research
- Industry collaboration
- Supply Chain Mapping
- Consumer Research
- Competitor Analysis
- Economic Analysis
- Extension and Communication Activities
- 3 Year Market Development and Investment Program



# Introduction

## **Project Team Members:**

- Dr Robin Roberts – Griffith Asia Institute, GU
- Clinton McGrath – DAFF
- Bill Johnston – DAFF
- Adriano Brescia – TIQ
- Daiji Takashima – TIQ Tokyo
- Iori Forsythe – TIQ Tokyo

## **Acknowledgments:**

- HAL
- AUSVEG
- Vegetables WA
- Department of Agriculture and Food, Western Australia
- Vegetables VIC
- Local Land Services, NSW





# Introduction

## What do we aim to achieve today?

- To work in partnership with industry
- To gain your input into the research we undertake
- To learn from other vegetable exports past and present
- To seek your direct involvement and participation in the project
- Identify businesses/organisations to form project steering committee



# Desktop Research

## What have we done?

- Collecting some import statistics
- Competitive analysis
- Import regulations/quarantine/phyto sanitary/MRL's limits (Positive list)
- Consumer behaviour
- Identifying the key importers/wholesaler/retailers
- Costing
- Japanese domestic production and seasons
- Identifying opportunities





# Desktop Research

## Overview of Japanese Market

- Japan has the world's third-largest economy, having achieved remarkable growth in the second half of the 20th Century.
- Population: 126.4 million (UN, 2012)
- Japan's food self-sufficiency rate in fiscal 2012 remained at 39 %
- Japan decided to join the negotiations for the Trans-Pacific Partnership (TPP) in March 2013
- Aging Farmers



# Desktop Research



## Objective

- Conduct desktop research to determine market demand, competitors, market access, barriers to entry and foodservice, retail and consumer trends.

## Methodology

- Collect Japan's production and import statistics and trends from MAFF
- Review existing reports prepared on broccoli and vegetable market for Japan
- Identify key in-market suppliers, product formats, branding, packaging of broccoli in retail and foodservice sectors. Identify key retail and foodservice operators in the vegetable market. Identify market access and other trade barriers.



# Desktop Research



## Overview - Japanese Market

- The Japanese market for fresh fruit and vegetables has traditionally been supplied locally, with imports limited to a narrow range of products.
- The Great East Japan Earthquake and subsequent tsunami of 11 March 2011 caused production and supply shortages of fresh vegetables in the Tohoku area
- Price of domestic fresh produce remains higher than imported produce, as Japanese farming efficiency is lower than other countries due to small production yields and high labour costs.
- The total volume of fresh vegetables (excluding only fresh fruit items within HS code 08) imported into Japan in 2012 was JPY98.1 billion – an increase of 11 per cent compared to the previous year.

# Desktop Research



## Competitive Advantage – Australia

- Australia's diverse climate and soil varieties
- Consumer awareness of Australia's clean, green environment and low chemical usage
- Less shipping time compared to other countries in the southern hemisphere
- Improved domestic infrastructure for delivery of imported products into Japan
- The deregulation of Japanese plant quarantine laws is easing restrictions and opening up markets for new products
- FTA



# Desktop Research

## Who is our main competitor?

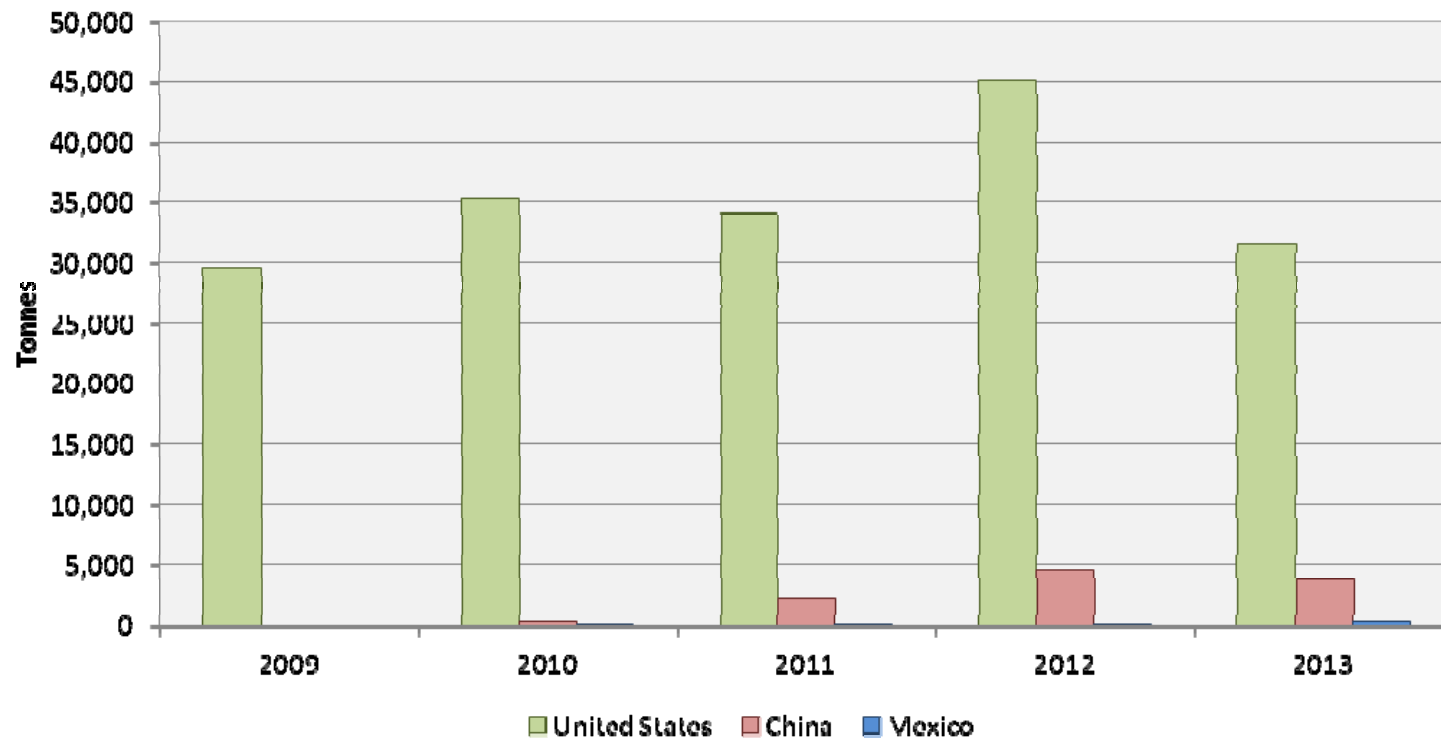
- US
- Asia
- China is recognised as one of the lowest-cost suppliers of vegetables to Japan





## Imported Broccoli Fresh: Market Size and Growth

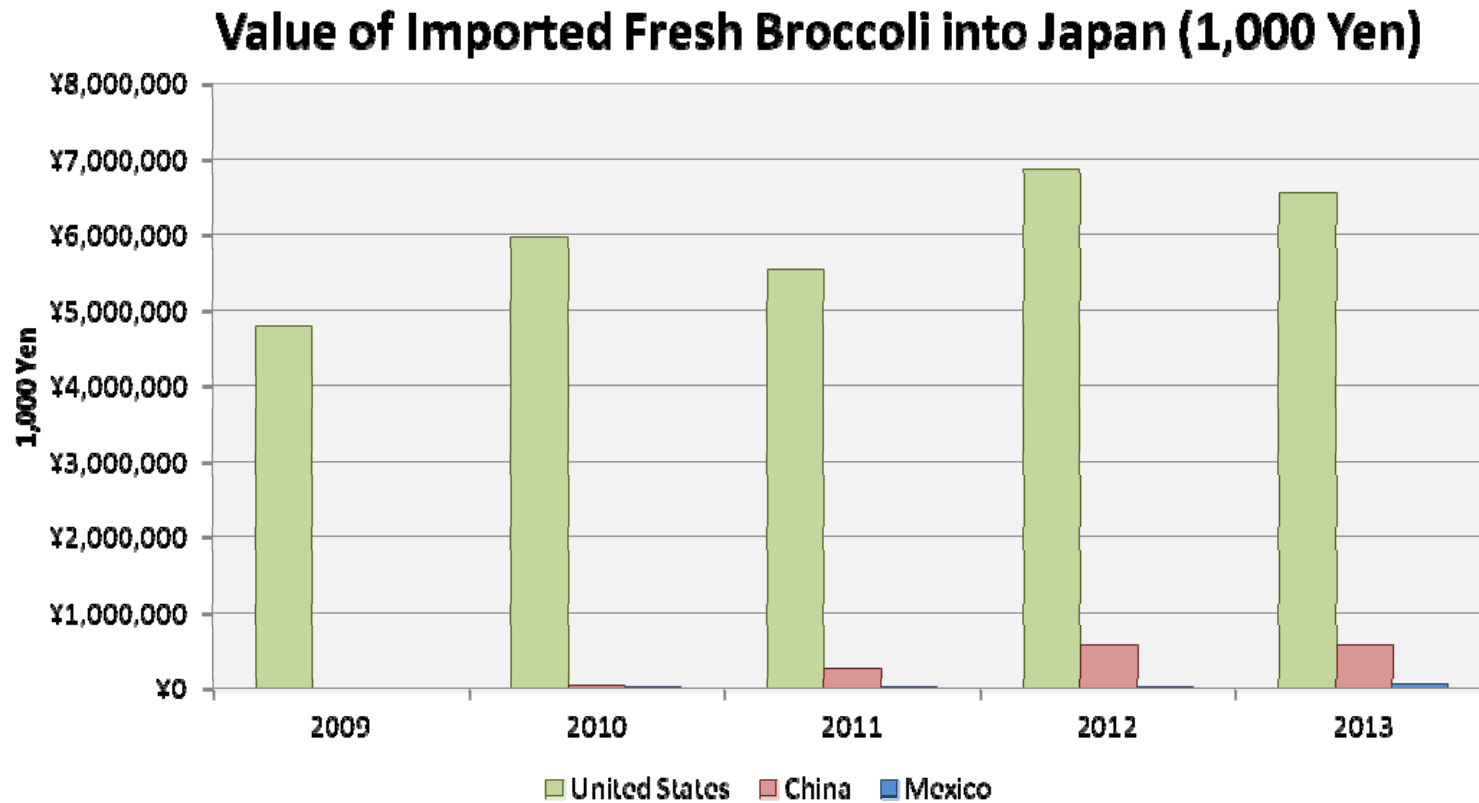
**Quantity of Imported Fresh Broccoli into Japan (tonnes)**



# Desktop Research



## Imported Broccoli Fresh: Market Size and Growth

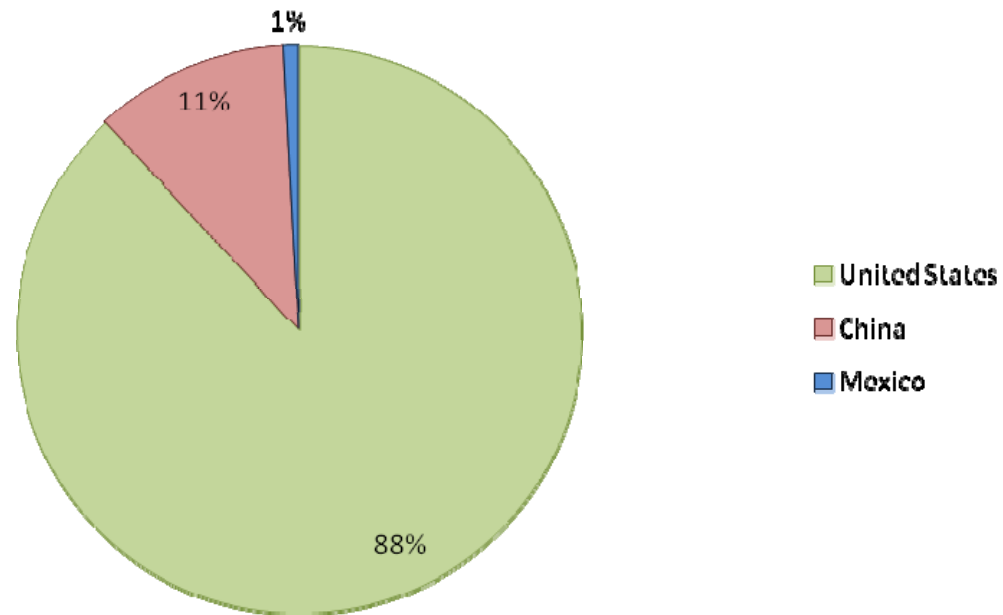


# Desktop Research



## Imported Broccoli Fresh: Market Share

Quantity of Imports into Japan 2013 (tonnes) - Fresh Broccoli





# Desktop Research



## Imported Broccoli Fresh: Price/Kg

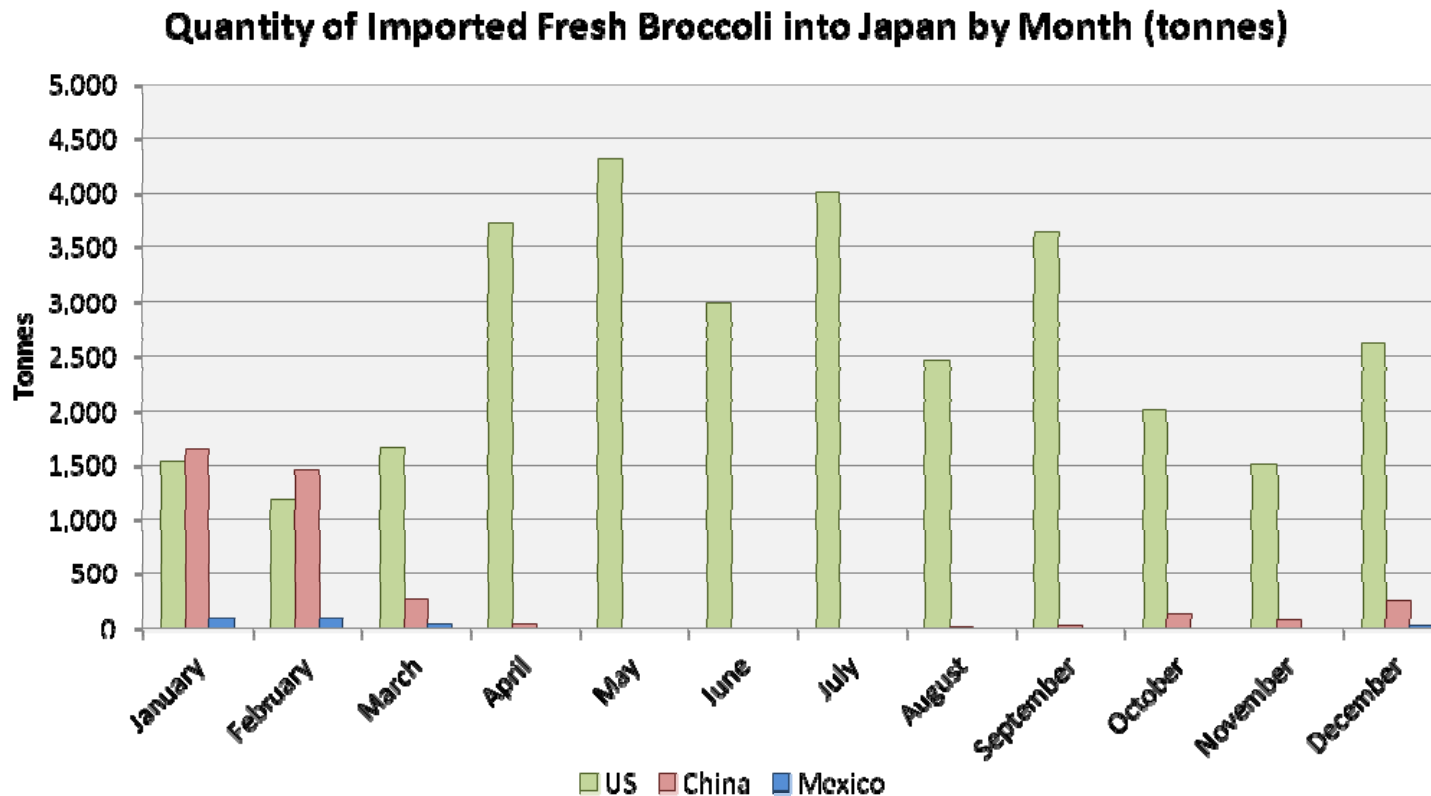
	Yen per kg	AUD per kg
United States	¥207.17	\$2.15
China	¥147.98	\$1.54
Mexico	¥181.50	\$1.89



# Desktop Research



## Imported Broccoli Fresh: Monthly Import Trends



# Desktop Research

## Japanese Production/Seasonality

### 基礎データ DATA

分類: アブラナ科アブラナ属

原産地: 地中海沿岸のヨーロッパ

季節の分類: 冬

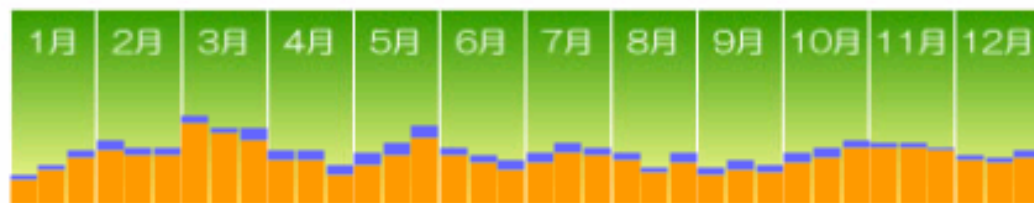
多く出回る時期: 10月~3月頃

国内の栽培面積: 約1万3,600ヘクタール(2012年)

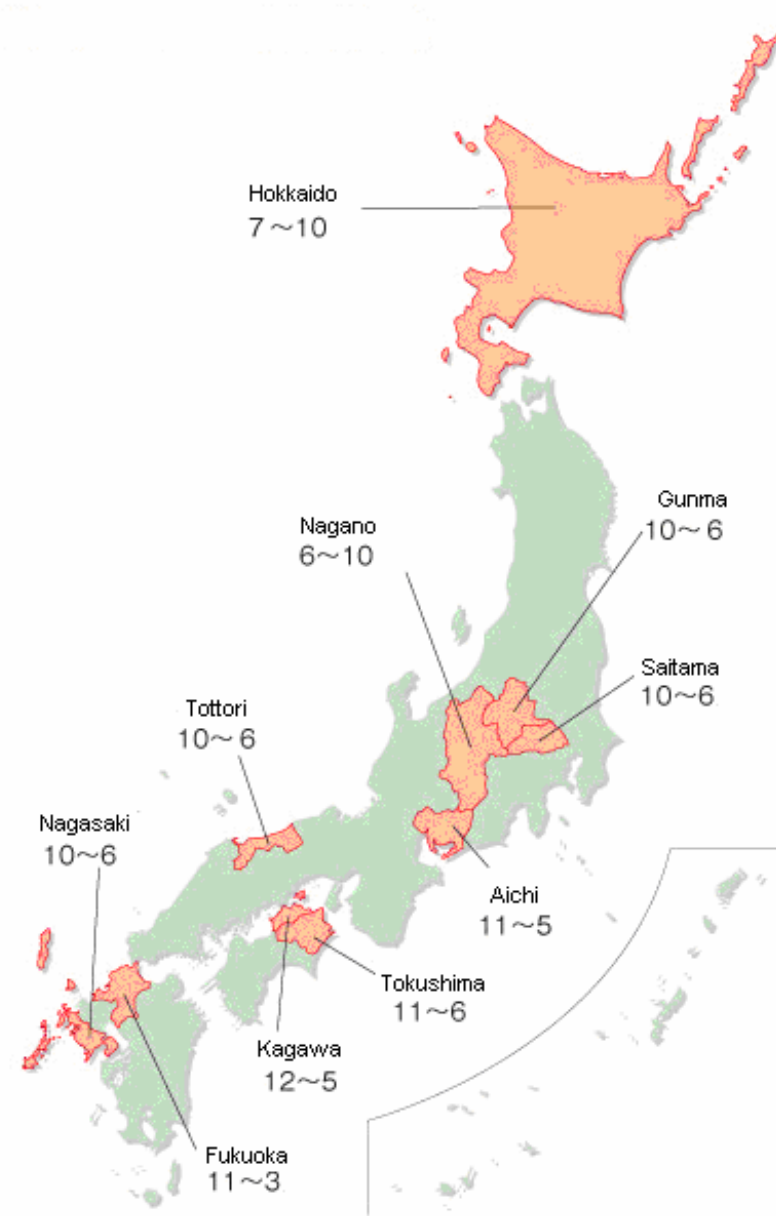
国内の年間出荷量: 約12万2,500トン(2012年)

主な産地: 北海道(約17%)、愛知県(約12%)、埼玉県(約11%)

### 旬の時期(過去2年の出回り時期の平均)



参考: 農林水産省統計 年間卸売総量を100%にしたときの割合(※主要卸売市場)

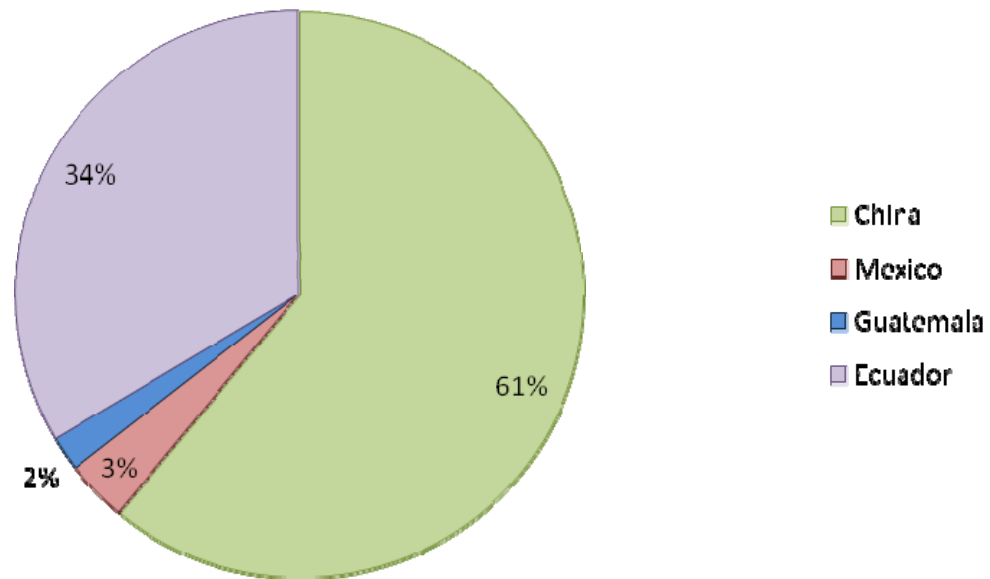


# Desktop Research



## Imported Broccoli Frozen: Market Share

Quantity of Imports into Japan 2013 (tonnes) - Frozen Broccoli



# Desktop Research



## Market Access:

### •Phytosanitary Certificate

Key importers of Broccoli	FTA with Japan	Tariff
USA	No	3%
China	No	5%
Mexico	Yes	0%
Taiwan	No	5%
Thailand	ASEAN	0%
Guatemala	No	3%
Ecuador	No	3%
Australia	Yes (to be commenced)	3% (0% with FTA)

# Desktop Research



## Market Segment

- Top 5 supermarkets (AEON, Seven & I, Uny, Daiei, and Izumi.) represent 63.8% of all sales.
- The two main players, AEON & Seven & I, account for 53% of all supermarket sales.

	Company Name	Sales Share
1	Aeon Group	28.2%
2	Seven & I Holdings	24.8%
3	Uny Group Holdings	4.3%
4	Daiei	3.8%
5	Izumi	2.7%



# Desktop Research



## Why Broccoli? – Popular with Japanese Consumer

- Broccoli has plenty of Vitamin A which prevents from getting Flu or Cold (Increasing Immune system)
- With winter having less green vegetables in Japan, Broccoli is one of the popular vegetables to be used in many ways. (e.g stew, stir-fry, salad, hot pot etc)
- Believed to be double of Vitamin C compared to single lemon.
- Believed to be very good for skin
- Anti-aging
- Known to be anticancer activity



# Desktop Research

- US Broccoli selling for ¥258 in Saitama Japan







**Questions/Feedback?**



# Industry Collaboration



## Objective

- Work in a collaborative partnership with vegetable levy payers and exporters to direct and oversight the project activities and actively participate in in-market activities.

## Methodology

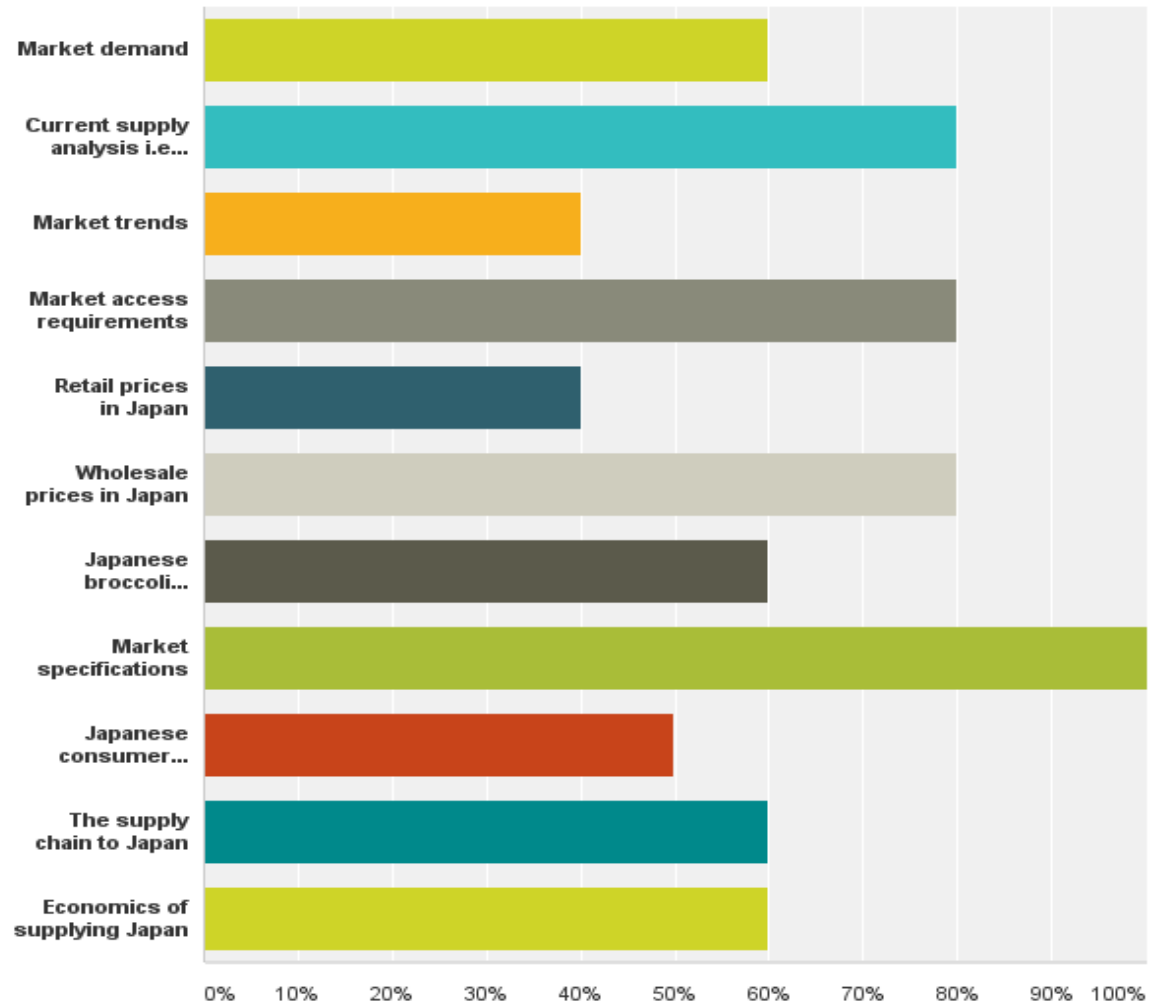
- Hold an industry symposium involving businesses along the supply chain from seedling suppliers through to exporters. From this symposium a project steering committee of an AUSVEG representative, broccoli growers, seedling suppliers and exporters from key production states.
- Survey key broccoli growers to identify information gaps and issues regarding the Japanese market and attitudes to export.



# Group Survey Findings

**Q5** What would you see as the priorities for the project team to investigate for the Japan market? (Multiple answers allowed)

Answered: 10 Skipped: 3

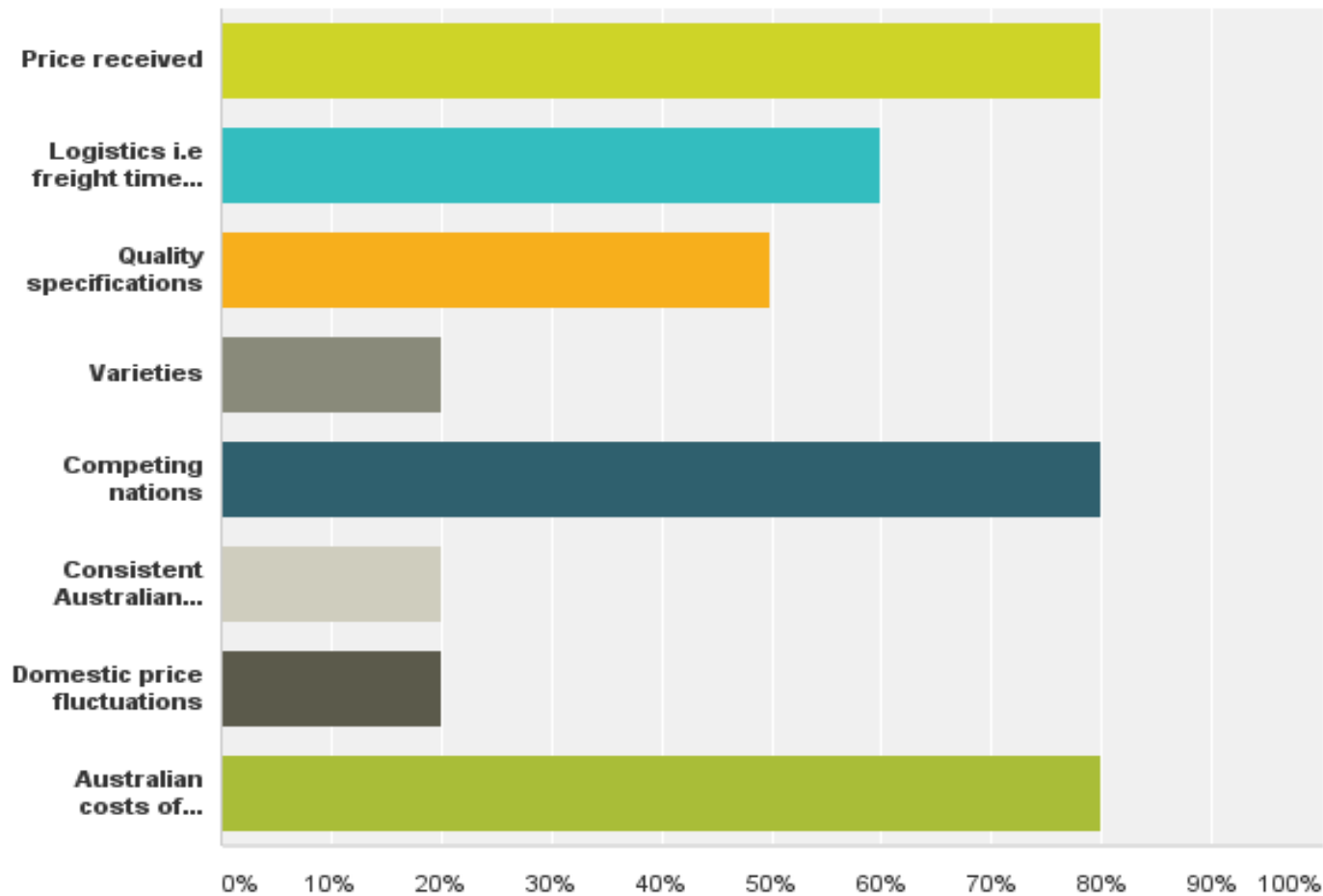


# Group Survey Findings



**Q6 What would you see as the main barriers as to increasing broccoli exports to Japan from Australia? (Multiple answers allowed)**

Answered: 10 Skipped: 3





**Questions/Feedback?**



# Supply Chain Mapping



## Objective

- Map the supply chains from growers to the final consumer for imported broccoli to gain knowledge of market specifications, develop relationships and document costs.

## Methodology

- Conduct in-depth interviews with businesses along the fresh produce supply chain (growers, exporters, freight-forwarders, importer-distributors, wholesalers, retailers, foodservice operators) to identify product specifications, supply periods, competitors, pricing, packaging, opportunities for differentiation and procurement / quality issues
- Undertake supply chain mapping to identify key market segments, relevant businesses trading imported broccoli, key distribution channels and costs along the chain
- Invite industry project committee members to participate in the market visit



# Supply Chain Mapping – Domestic Research



## Australian broccoli product specification

Attribute	Description
Count size & pack weight	<ul style="list-style-type: none"><li><input type="checkbox"/> 26 – 28 head / carton (300g - 350g/head).</li><li><input type="checkbox"/> Broccoli heads must be reasonably uniform / even sized in all cartons. Cartons are packed to weigh approximately 8kg without ice or 10+ kg with ice (2-3kg of flaked ice)</li></ul>
Stalk length	<ul style="list-style-type: none"><li><input type="checkbox"/> 3-4 fingers in length</li></ul>
Head shape	<ul style="list-style-type: none"><li><input type="checkbox"/> Is dependant on variety. Both dome shaped and flat shaped head varieties are produced in Australia.</li><li><input type="checkbox"/> Dome shape is preferred in South East Asia as these are also heavier and more compact (easy to pack) than flatter shaped heads.</li></ul>
Colour	<ul style="list-style-type: none"><li><input type="checkbox"/> Dark green or light green colour is acceptable as long as colour is uniform throughout the pack.</li><li><input type="checkbox"/> Purple colour on heads is not acceptable.</li></ul>
Packaging & labelling	<ul style="list-style-type: none"><li><input type="checkbox"/> Preference for flaked ice in all cartons (importers will top up with ice if there isn't enough).</li><li><input type="checkbox"/> Other packaging options include: single layer cartons with no ice and good ventilation, labels with key messages tagged on stalks (Australian grown, clean and green, healthy) using rubber bands.</li></ul>
Other	<ul style="list-style-type: none"><li><input type="checkbox"/> All other specifications are the same as Australian specifications. Eg. Free from pests, no dirt, no flowers.</li></ul>
Varieties	

...what specification is suitable for Japan?



# Supply Chain Mapping – Domestic Research

## Broccoli export supply chain

### Queensland – Australian growers

- 10-12 week period from planting to harvest
- Grower negotiates price, quantity and dispatch date with exporter
- Harvest into field bins and hydro cool within 2-4 hours of harvest.
- After hydro cooling, store into cold room at 0°C (typically within 24 hours of harvest)
- Grade and pack for export into styro-foam cartons with ice, then cold store at 0°C (24-48 hrs)

### Australian exporters and freight forwarders

- Load into airfreight cargo containers (AV, PMC) or sea freight container
- Transport to port same day (airport or seaport)

What happens next.....?

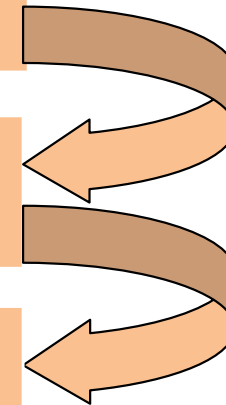


### Market channels

The market for imported broccoli in Japan  
- 36,100 MT fresh  
- 34,400 MT frozen

Where is it going?

- Import-Wholesale
- Retail
- Food service
- Food processing





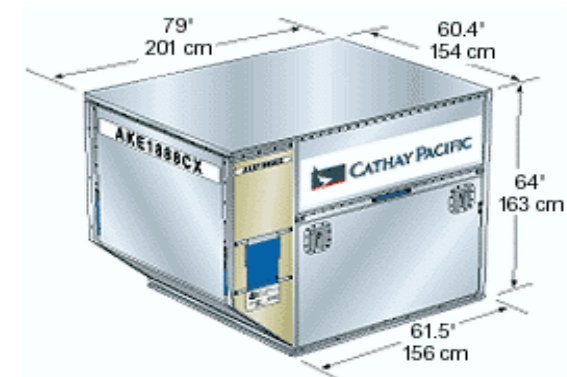
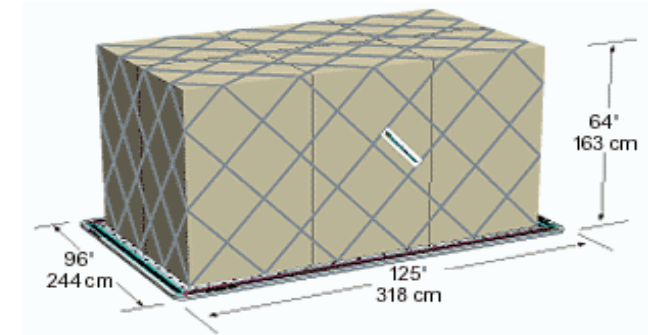
# Supply Chain Mapping – Domestic Research



## Survey – Logistics data and general freight requirements

Some of the questions we are asking:

- Can you/do you sea/air freight to Japan?
- What are the destinations in Japan?
- What are the flight/steam duration?
- What are the frequencies of flight/steam?
- Do you have AQIS inspection facilities/service?
- Are there any other security requirements?
- What paperwork is required?
- What are the costs involved?
- What container options are available to Japan?
- What volumes can fit on a container?
- How would a farmer get broccoli to your facility?
- Can you consolidate loads?
- What is the cut-off for delivery prior to flight/ship?



# Supply Chain Mapping – In-market Research



## Market segments

Project staff will travel in-market in August 2014 to scope key market segments relevant to broccoli trade and consumption:

- Import-Wholesale
- Retail
- Food service
- Food processing

The following companies have been identified as existing and potential traders of imported broccoli and will be engaged during the market visit:

Importer-Wholesaler	Retailer
<ul style="list-style-type: none"><li>• Union (US/CHINA)</li><li>• Itochu-Dole</li><li>• Royal (US/CHINA)</li><li>• Funasho</li><li>• Tokyo Seika Boueki</li><li>• IPM-Nishimoto (US/CHINA)</li><li>• Sun Globe Foods (US/CHINA)</li><li>• Watari</li><li>• Mitsui (linkage with Seven and I)</li><li>• Sojitz Shokuryo</li><li>• Mitsubishi Shoji</li></ul>	<ul style="list-style-type: none"><li>• AEON Seven and I Group (Itoyokado, Seven Eleven)</li><li>• Uni group CGC (procurement arm for supermarkets)</li><li>• Daiei</li><li>• Izumi</li></ul>



# Supply Chain Mapping – In-market Research

## Survey – Supply-chain businesses

Some of the questions we are asking:

### General

- Do you have import experience?
- What are the key products you trade or have an interest in trading?
- What sectors of the market do you service – Wholesale, Retail supermarket, Food Service, Food Processing, End user?

### Import, Distribution, Consumption

- Do you currently purchase / trade or have interest in purchasing / trading broccoli?
- Do you purchase / trade imported or local produce?
- From which countries / exporters / suppliers are you purchasing broccoli?
- Are there any issues or challenges with your current suppliers? (Product quality, supply gaps, pricing)
- What quantity do you import weekly?
- Do orders fluctuate or remain consistent during the year? When are peak periods of demand?
- How frequently do you place orders?
- Who do you sell broccoli to? Do you sell to customers outside Japan?
- How do you distribute orders to your customers?
- How often do you supply your customers (daily, weekly)?
- What are the key product specifications (variety, head size, stalk length, colour, packaging) that your customers prefer? Why?
- Are you pleased with the packaging or could it be improved?
- What is the estimated pricing / percentage mark-up to your customers?
- Do you experience issues with product wastage? Do you have processes in place to minimise wastage?

# Supply Chain Mapping – In-market Research

## Survey continued – Supply-chain businesses

### Logistics

- What is your preferred method of delivery (air-freight/sea-freight / road)?
- How long does it take for orders to be cleared at the port?
- How are imported consignments dispatched to your DC?
- What happens upon receiving orders at your DC (inspection, temperature check)?
- Do you use temperature loggers to monitor consignments?
- How long do you store broccoli before dispatching to your customers?
- At what temperature is broccoli held in cold storage?
- Do you value add broccoli or other vegetables? (Pre-packing for retail, trimming)

### Marketing

- Do you see opportunity for further growth in Japan for broccoli? What activities will help to grow the category?
- What type of support would you like to receive to assist in managing and growing the category? (Information resources, promotional materials, video training packages in storage, handling and merchandising)
- Would you be interested in entering into a program supply arrangement?
- Would you be interested in supporting supermarket promotions for Australian broccoli? If so, how soon?

### Value adding/Product differentiation

- What opportunities do you see for value adding ie different varieties, packaging, processed
- What products are currently on the market, who are supplying these?
- Is there any branding, how is the product being positioned?
- What factors need to take into account in value adding?
- What type of food safety accreditation do you require? Do you see this as a point of differentiation for Australia product – why or why not?



**Questions/Feedback?**



# Consumer Research



## Objective

- Conduct consumer research in Japan to assess consumption habits, demographics, usage and attitudes to imported broccoli

## Methodology

- Undertake quantitative research with Japanese consumers to build a consumer profile including demographics, attitudes, buying behaviours and trends relating to vegetables and broccoli



# Consumer Insights - planning

- To establish the underlying market implications for broccoli consumption by consumers, official government sources and national bureau of statistics of Japan and published Japanese studies are being adopted and incorporated in this project.
- Other primary sources will provide comprehensive consumer insights and profiling derived from consumer surveys carried out in the leading Japanese cities between July and August 2014.
- The survey aims to capture information from 1000 respondents. The responses will be analysed to identify habits and perceptions of Japanese consumers related to green vegetables and broccoli.
- Please note the survey method has been chosen as Japanese consumers are not favorable to the focus group research



# Consumer Insights – planning

The survey structure has been planned as follows:

- Closed-ended questions, in Japanese language
- 15 mins in length
- 1000 total completed surveys
- Population sample is 18 years and above
- Survey screening question: Have you purchased broccoli in the last six months?
- Insights will be captured on:
  - For example - consumption (in-home & out of home consumption;
  - most prominently consumed green vegetables;
  - intended and prevalence of use;
  - general usage in other food preparations;
  - price vs. quality purchase motivation;
  - preference for packaging format;
  - product colour and presentation preference;
  - country of origin motivations and
  - place of purchase and frequency of purchase.







**Questions/Feedback?**



# Competitor Analysis



## **Methodology**

- Undertake an analysis of the key competitors (USA, China) to determine their strengths and weaknesses to determine points of differentiation.



# Competitor Analysis



## USA

- Most of the Broccoli which come from USA, are from state of California (Salinas area and Santa Maria area).
- 38 broccoli per box
- 48 boxes per palette
- Crushed ice is inserted into each box using an automatic machine
- 20 palettes (960 cases) are transported via truck to the port of LA and is shipped to Japan using a high speed vessel taking 11 days.



# Competitor Analysis



## **Mexico:**

Food safety issue - Guanajuato's broccoli contaminated with aluminium

A university research detected concentrations of heavy metals such as cadmium, nickel, lead and aluminium in the broccoli produced in the states of Guanajuato and Puebla.



# Competitor Analysis

## 2014 Chinese Green Fresh Broccoli

FOB Price:

US \$240 - 400 / Metric Ton Get Latest Price

Min. Order Quantity:

5 Metric Ton/Metric Tons Broccoli

Supply Ability:

3,000 Metric Ton/Metric Tons per Year Broccoli

Port:

Qingdao,China

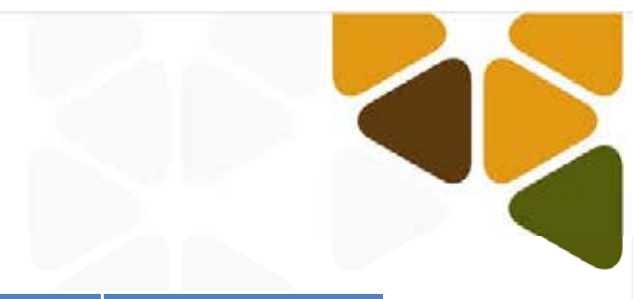
Payment Terms:

L/C,T/T



Source: [http://www.alibaba.com/product-detail/2014-Chinese-Green-Fresh-Broccoli\\_1891509849.html?s=p](http://www.alibaba.com/product-detail/2014-Chinese-Green-Fresh-Broccoli_1891509849.html?s=p)

# Competitor Analysis



Factors	Japan	USA	Mexico	China
Production costs				
Import price				
Seasonality				
Characteristic of varieties				
In-market support				
Packaging				
Product Quality/Freshness				
Shelf life				
Food safety/certification				
Branding				
Value-adding				
Consumer perceptions				





**Questions/Feedback?**



# Economic Analysis



## **Objective**

- Undertake an economic analysis to evaluate the cost of exporting from farm gate to market including a return on investment





# Market to Farm Gate

- The economic model has been designed to map the supply chain from the end buyer in Japan back to the farm gate.
- On farm costs of production vary from farm to farm so the aim is to provide a robust economic decision tool that provides the producer with 'breakeven' figure at the farm gate (working from the market) to which they can compare their ability to generate profits.
- The model incorporates both airfreight and seafreight options for comparison



# Airfreight Segments



## Japanese Sale Point to Export Origin

- Establishes market price
- Deducts commissions
- Quantifies export destination costs such as transport, customs clearance, taxes and duties, storage and repacking, market fees.

## Export Origin to Packhouse

- Air shipment rates calculated
- Establishment of origin cost structure including certificates and other documentation, AQIS and other clearances, freight and handling, storage, insurance, insulation and loading.



# Airfreight Segments



## Packhouse to Farm Gate

- Covers any packhouse expenses.
- Includes handling of product on arrival, treatments, grading and packing, packaging, storage as required, labelling and strapping of box, stacking of boxes ready for transport to despatch facility, AQIS inspection charge.
- This segment also covers any transport costs from the farm gate to the packhouse facility.



# Seafreight

- The seafreight option considers:
  - Freight forwarder costs
  - Shipping company costs including handling & transport at destination and origin, slot booking, customs clearance, security charges.
  - Destination costs covers port container carriage, import fees, quarantine costs, transport, agents fees.



# Risk Analysis



- Since the development of agriculture farmers have tried to find ways of reducing risk by exerting better control over production processes, yet risk remains an inevitable feature of the decision making process.
- Decision making under certainty is straightforward and leads to the optimal solution (maximum profit) - Decision making under risk requires more information.
- Risk and uncertainty are features of most business and government activities and needs to be understood to ensure rational investment decisions.



# Risk Analysis - Exchange Rates and Export Price

Analysis based on

## Exchange Rates

Randomly selected exchange rate **97.25**

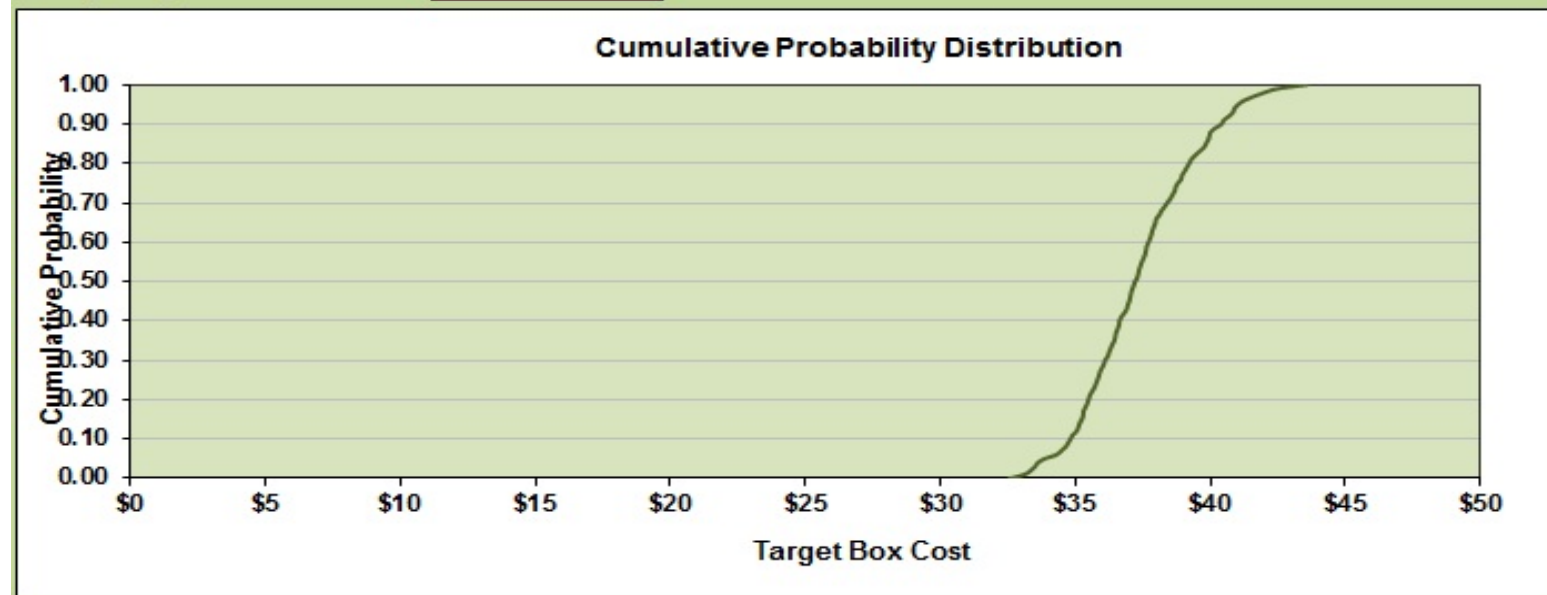
Price	JPY					
	Price per Box	Probability				
Minimum	3,600.00	0.00				
Poor	3,800.00	0.20	20% chance of	3,600.00	and	3,800.00 per box
Average	4,000.00	0.70	50% chance of	3,800.00	and	4,000.00 per box
Good	4,200.00	0.90	20% chance of	4,000.00	and	4,200.00 per box
Maximum	4,400.00	1.00	10% chance of	4,200.00	and	4,400.00 per box

## Results of Risk Analysis

Lowest target per box **\$32.55**

Highest target per box **\$43.57**

Average target **\$37.37**



# Food for Thought

- Gross margin data for southern Queensland (gross revenue less variable costs) suggests a variable costs are in the range of **\$12.00 to \$15.00 per box**. Fixed and capital costs also need to be considered – at approximately 20% this brings the range to **\$14.40 to \$18.00 per box**.
- US study – per box costs range between **\$8.40 to \$11.70** (includes capital and fixed costs). In AUD this is **\$9.00 to \$12.50 per box**.



# Food for Thought



- Export price Singapore **\$1.71 per kg** (*McGrath*)
- Import data regarding value and quantity of fresh broccoli suggest the following average prices per kilogram for 2013 imports:
  - US - **\$2.15 per kg** (**\$17.20 per box**)
  - China - **\$1.54 per kg** (**\$12.32 per box**)
  - Mexico - **\$1.89 per kg** (**\$15.12 per box**)
  - Average - **\$1.86 per kg** (**\$14.88 per box**)
- US production cost was between \$9 and \$12.50 suggesting they can draw profits of **\$4.70 to \$8.20 per box**.
- Using the cost of production range for SQ producers – need to achieve between **\$1.80 to \$2.25 per kg** to breakeven.







**Questions/Feedback?**



# Extension and communication



## Objective

- Develop and implement an extension and communication plan throughout the project and collaborate with existing HAL projects and AUSVEG communications



# Extension and communication



## Extension/Communication Activities

Activities	Target Audience	Timelines
Grower Survey	Growers	completed
Profiles	All stakeholders	Throughout project
Webinars	All stakeholders	After in-market research
Electronic media – websites, e-newsletters, magazines	All stakeholders	Video this seminar. Profiles, final report findings
Presentations/ meetings	All stakeholders	



# Extension and communication



## AusVeg Weekly Updated

### Japan gave us sushi – can we give them our broccoli?

Trade and Investment Queensland is leading a HAL-funded project on broccoli exports to Japan.

They are interested in growers' views on assessing the market opportunities to recapture Australia's broccoli exports to Japan, and encourage growers to register their interest to receive updates on the project 'VG13048 - Market analysis and strategy: broccoli to Japan'.

Growers are asked to provide input about what would enable them to determine if exporting to Japan is a viable option. The project team will research opportunities for horticulture based on suggestions provided, and growers will receive regular updates on the findings and have the opportunity to connect with other businesses wishing to export to Japan.



# Extension and communication

VegetablesWA News article

## **Japan gave us sushi – can we give them out broccoli?**

The following is an overview of the project:

A value chain approach has been adopted for this project. All businesses from seedling companies to consumers will be engaged to provide a thorough analysis of the market opportunities and viability of boosting Australia's exports of broccoli to Japan. A key strategy will be the active involvement of growers and exporters in directing project activities and participating in in-market activities.

The key strengths of this proposal include the project team, methodology and existing collaboration with broccoli growers on a Global Markets Initiative (GMI) funded export project to Singapore. GMI is an export development program managed by TIQ and DAFF-Qld and has been highly successful in boosting exports of mangoes, avocados and mandarins.

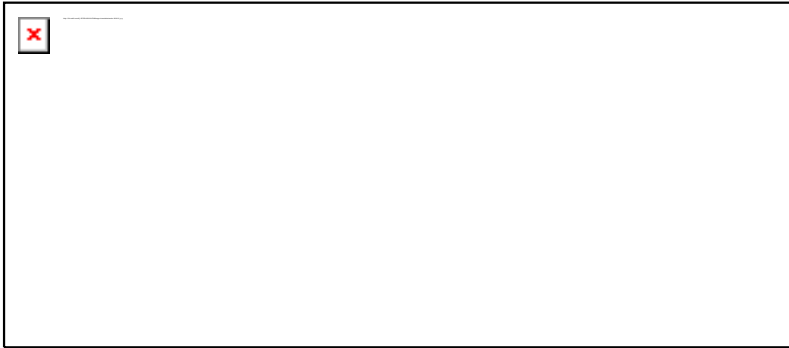
TIQ's project team includes an experienced Business Development Manager based in Tokyo who has previously undertaken export development on value added broccoli opportunities in Japan. The team also includes Clinton McGrath from DAFF-Qld who is an experienced horticulturalist and is part of the project team involved in the GMI funded broccoli export project to Singapore. DAFF-Qld and TIQ are combining their trade and industry experience to collaborate with the academic expertise of Griffith University Department of International Business & Asian Studies to ensure a robust and rigorous methodology. The experience of the project team coupled with the learnings from the GMI funded broccoli project to Singapore, will deliver a well researched market analysis and strategy for broccoli exports to Japan which will focus on export outcomes.



# Extension and communication

VegetablesWA News article

Japan gave us sushi – can we give them our broccoli?



Trade and Investment Queensland is leading a HAL-funded project on broccoli exports to Japan.

They are interested in growers' views on assessing the market opportunities to recapture Australia's broccoli exports to Japan, and encourage growers to register their interest to receive updates on the project 'VG13048 - Market analysis and strategy: broccoli to Japan'.

Growers are asked to provide input about what would enable them to determine if exporting to Japan is a viable option. The project team will research opportunities for horticulture based on suggestions provided, and growers will receive regular updates on the findings and have the opportunity to connect with other businesses wishing to export to Japan.

To provide feedback, [click here](#).





**Questions/Feedback?**



# Three Year Market Development Plan



## **Objective**

- Develop a three year Market Development Investment Program for broccoli exports to Japan
- Prepare a new project to implement the Market Development Investment Program

