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# Hong Kong

## Retail Food Sector

### Report

### 2002

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#### Report Highlights:

Total retail sales of food and drinks in Hong Kong for 2001 rose 2.5% while retail sales of food, alcoholic drinks, and tobacco (excluding sales in supermarkets) for Jan-Sept 2002 decreased 3.6%, that for supermarkets increased 1.2%, compared with the same period last year. Although the supermarket category constitutes a very tiny number of Hong Kong's total retail outlets, its share in terms of retail sales has risen from 44% of total sales in 1995 to 52% in 2001. A very noticeable trend in the past year or so, many internationally known branded products, historically associated with and produced in the U.S.A., are now produced overseas, even in Mainland China.

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Annual Report  
Hong Kong [HK1], HK

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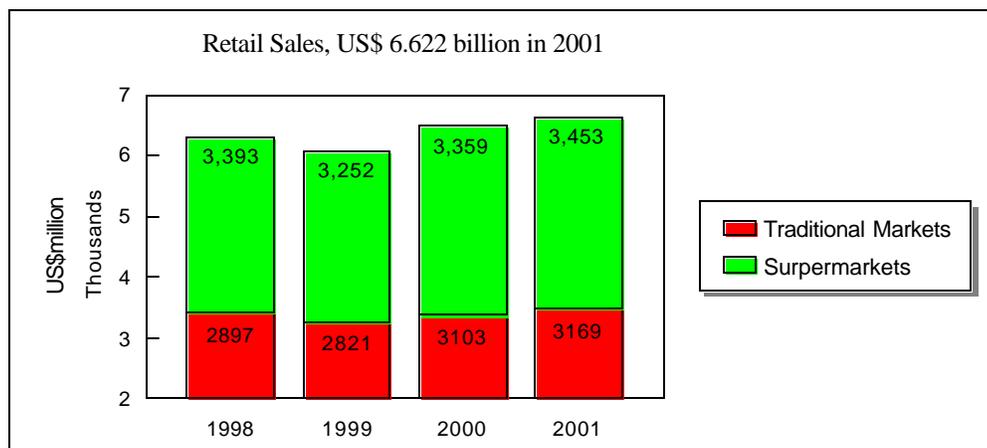
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## I. Market Summary

- Hong Kong has a population of 6.727 million with an annual growth rate of 0.9%. Its per capita GDP stands at \$24,400. GDP grew by 0.5% in the second quarter of 2002, rebounding from the 0.5% decline in the previous quarter. The official forecast of GDP growth has been revised upward to 1.5% for the whole of 2002.
- The total retail sales of food and drinks in Hong Kong for 2001 reached US\$6.622 billion, rising 2.5% from US\$6.462 billion in 2000. For January - September 2001, retail sales of food, alcoholic drinks, and tobacco (excluding sales in supermarkets) decreased 3.6 %, while that for supermarkets increased 1.2%, compared with the same period last year.
- Retail establishments in 2000 approximately amounted to 16,296, which included (1) 91 supermarkets and convenience stores (including retail outlet branches estimated at about 800) and (2) 16,205 wet market stalls and “mom and pop” shop operators. Retail shops in Hong Kong generally are very small in size, about 98% of which hire less than 10 employees.
- Different retail outlets have their own features. Wet markets are still very strong in “fresh food” retail such as meat, seafood, fruit and vegetables. “Mom-and-pop” shops sell conventional snacks and drink products. Convenience stores are characterized by a round-the-clock operation. Food products available include mainly snacks and beverages. In the past, Hong Kong supermarkets sold mainly canned food, snacks, biscuits (cookies and crackers), and beverages. In recent years, meat and produce also have become available in supermarkets. It is very evident that supermarkets are expanding their fresh meat and produce sections in order to capture additional market share from traditional wet markets. There are 13 department stores in Hong Kong that have supermarkets in them. Most of these are Japanese department stores and they tend to carry novelty products, particularly those from Japan.
- Although the supermarket category constitutes a very tiny number of Hong Kong’s total retail outlets, its share in terms of retail sales has risen from 44% of total sales in 1995 to 52% in 2001. The significant jump may indicate that supermarkets have taken much business away from traditional wet markets.



- There are two dominant supermarket chains in Hong Kong: The Wellcome Co. Ltd. (254 outlets) and ParknShop (206 outlets). ParknShop and Wellcome account for about 80 percent of the supermarket turnover. Both supermarkets are able to work closely with real estate developers to open stores in strategic locations, thus maintaining their significant market share. Each supermarket chain carries over 10,000 SKU. The other players include: China Resources Supermarket (CRC), Dah Chong Hong, Jusco and City Super.
- Gateway and PrizeMart are two supermarkets in Hong Kong selling primarily US products. PrizeMart has 9 stores and carries about 1,500 SKUs. Gateway, with only one store in the Central district, carries over 4,500 SKUs, all of which imported directly from US consolidators. Both supermarkets do not charge listing fees.
- In recent years, a "shopping mall" concept has emerged in the operation of some new superstores, i.e., a variety of services are provided. For example, a newly opened Wellcome, with a floor area of 54,000 square feet, provides massage service. A doctor specializing in Chinese medicine has an office within the store providing consultation to patients. Presently, Wellcome has 17 superstores.
- The largest ParknShop store in Hong Kong has a floor area of 72,000 square feet and sells over 20,000 product categories ranging from snacks to electrical household appliances. New features include a drug store operating inside the superstore with a full-time pharmacist. Also, this new superstore provides free internet service to customers once they have made a minimum purchase. This ParknShop megastore contains a zone in which all goods are priced at HK\$8; a move that could set off a war with existing HK\$10 bargain stores. The HK\$8 zone features 1,000 Japanese-style items ranging from cooking utensils to skin-care products.
- In 2001, a new upscale supermarket called Great Food Hall opened, with one outlet at the moment. It is associated with ParknShop but products on the shelf are more upscale. Located in a commercial area, it targets a better-off clientele. Great Food Hall, City Super and Oliver's are competing in the same market segment. The opening of the Great Food Hall provides another excellent retail outlet for quality US products.

When new products are proved popular in this new outlet, then they can find their way easily to ParknShop's chain stores.

- Currently ParknShop, Wellcome, and City Super are the three supermarkets offering grocery shopping over their websites. The service is however not attracting a lot of interest, due to the convenience of shopping in Hong Kong, security concerns and the cost of delivery.
- Food products can be imported to Hong Kong duty free except cigarettes and alcoholic drinks. As for technical import requirements, the basic tenet is that no food intended for sale should be unfit for human consumption. Products which require import permits/health certificates include meat, milk and frozen confections. The Hong Kong government accepts import applications from Hong Kong importers. In other words, local importers and not U.S. exporters are required to apply for import permits. U.S. exporters need to supply their agents/importers with necessary documentation such as health certificates from the U.S. government.
- At present, there is no labeling requirement for genetically modified foods. The government has just completed a study on the economic implications of GM labeling. The result of the study has not yet been published. The government's GM labeling policy will be based on the study and development of Codex's discussion on GM labeling. The government has not announced any deadline for formulating a policy on GM labeling.
- Due to limited land resources and rapid urbanization, Hong Kong has to rely heavily on imports for its food supply. In 2001, local production contributed only 6% of fresh vegetables, 23% of live poultry, and 25% of live pigs. However, Hong Kong's total imports of consumer-oriented products and fish & seafood products amounted to US\$5.1 billion and US\$1.766 billion respectively. Though 49% of imports were re-exported, US\$3,361 million worth of consumer-oriented and seafood products were retained in Hong Kong for local consumption.
- Due to the increasing prevalence of dual income families, ready-to-cook food has become more popular. The major supermarket chains in Hong Kong have been putting more emphasis on convenience foods and home meal replacement.
- Because of the limited living space in Hong Kong, it is inconvenient for Hong Kong consumers to store food products. Therefore, bulk pack food products do not sell in Hong Kong, and small package food products are preferred.
- Hong Kong consumers have become increasingly more aware of food safety issues and nutrition values of food products. Clear indications of nutritional value on the package is certainly a good marketing strategy for health foods.
- Health products are well received in Hong Kong. A recent sales survey indicated that sales of milk surged in Hong Kong in 2001 as a result of aggressive marketing promoting its health benefits. Milk is promoted as one of the best sources of calcium and a health product. Since some Chinese have an intolerance to lactose, a component of milk, they may develop intestinal problems such as gas and diarrhoea. Therefore, Nestle has recently launched a lactose-reduced milk. Adult consumers are particularly interested in low-fat milk.

- According to the survey, other top sales growth products include breakfast cereal, chewing gum, soya drinks, drinks containing fruit juice, and ready-to-drink tea. Breakfast cereal and soya drinks are promoted as health food items. Marketers have been very creative in positioning chewing gum as an effective cold remedy. Money spent on chocolate grew by more than 10 per cent, as did that spent on corn or potato chips. Frozen dim sum sales also grew, in what retailers said was a mark of its convenience, low price and quality.

Advantages	Challenges
World's freest economy (Heritage Foundation's 2001 Index of Economic Freedom). Consistent free trade and free enterprise policies. No import duty except on liquor, cigarettes, hydrocarbon oils and methyl alcohol. Separate customs territory from Mainland China. No foreign exchange controls	Severe competition between different supplying countries, particularly Mainland China and Australia.
	A very price sensitive market; importers' buying decisions depend largely on price.
H.K. dollar pegged to the U.S. dollar, so U.S. products are not subject to price fluctuations based on exchange rates.	U.S. products are disadvantaged by a higher transport cost when compared with Australian and Chinese products.
Foreign and local businesses operate on a level playing field	Lack of trader and consumer awareness of U.S. foods. Traditional preference for European foods, due to previous ties with the U.K.
As one of the most affluent economies in Asia, a market leader for new products.	A virtual duopoly (between ParknShop and Wellcome) in food retailing allows retailers to charge high slotting (shelf space) fees.
International city; residents travel frequently and are receptive to western and novel food	
Port facilities are world-class, making Hong Kong a regional trade center and entrepot.	

## II. Road Map for Market Entry

### A. Supermarkets

#### Entry Strategy

To set up a representative office in Hong Kong is one of the most effective means that U.S. companies can use to sell their products to this market, but it is very costly. Apart from this entry strategy, there are three different ways for new-to-market exporters to get into the Hong Kong market:

Through agents : U.S. exporters may consider hiring an local agent. There are several factors to consider when hiring an agent. 1) Does the prospective agent already have an account with major supermarkets? Supermarkets will more readily accept new brand products when the agent already has an account with the supermarkets. 2) Does the prospective agent have a good marketing record and widespread distribution network?

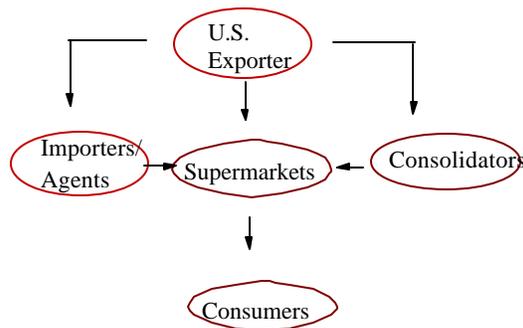
The advantage of having an agent is that it can help with marketing and distribution. Some companies may secure a very competitive price package with TV/magazine/radio for advertisements. In addition, well established companies have extensive distribution networks not limited to one or two supermarkets but to very extensive distribution outlets.

Direct to supermarkets : For branded products to sell direct to supermarkets, supermarkets usually require exclusive rights in selling the products in Hong Kong through their own outlets only. Otherwise, they will not consider any direct imports. In this case, expensive listing fees may be waived. For non-branded and large turnover products such as fruit, meat, and vegetables, supermarkets tend to buy direct from overseas exporters to cut costs.

Direct selling to supermarkets is difficult to handle because they demand strict on-time delivery and very often will not be able to take a whole container. Logistics is the largest problem that U.S. exporters have to deal with if they want to sell direct to supermarkets. However, they can better test the market if dealing directly with retailers.

Through consolidators : Major supermarkets in Hong Kong work with U.S. consolidators for some of their products. Their purpose is to introduce new products, which have already been very popular in other overseas markets, to Hong Kong.

## Market Structure



- ATO Hong Kong provides lists of local supermarkets and importers/wholesalers to U.S. exporters and we are happy to line up appointments if U.S. exporters come to Hong Kong exploring the market.
- For more information on food import regulations, please refer to the "Hong Kong Food and Agricultural Import Regulations and Standards, Importation of Food & Agricultural Products to Hong Kong 2001", Gain Report #HK1043.

## Major Supermarket Profile

Name of Retailer	Ownership	Food Sales US\$	No. of Outlets	Location	Type of Purchasing agent
Wellcome	Hong Kong	over \$1 billion	254, 17 of which are superstores	Hong Kong	Importers/Agents Direct Consolidators Exporters
ParknShop	Hong Kong	over \$1 billion	206, 51 of which are superstores*	Hong Kong	Importers/Agents Direct Consolidators Exporters
China Resources Supermarket	China	not available	71	Hong Kong	Importers/Agents Direct Consolidators
Dah Chong Hong	Hong Kong	not available	40	Hong Kong	Importers/Agents Exporters
Jusco Stores (HK) Ltd.	Japan	not available	8	Hong Kong	Importers/Agents Direct Consolidators
City Super	Hong Kong	not available	2	Hong Kong	Importers/Agents Direct Consolidators

\* The definition of superstore for Hong Kong is supermarkets over 10,000 sq. ft.

- Sources show that ParknShop and Wellcome account for almost 80 percent of the supermarket turnover. Both supermarkets are able to work closely with real estate developers to open stores in strategic locations, thus maintaining their significant market share. Because of their significant market share, they are able to make suppliers offer goods to them at very competitive prices, so that they are able to set retail prices lower than their competitors'. Consequently, it is difficult for small competitors to survive and new players to enter into the market.
- In 2002, supermarkets have launched aggressive marketing activities to further expand their market share. In April and May, ParknShop and Wellcome, cut the prices of fresh pork to a level below that offered by wet markets. Many consumers have switched to buy pork in the two chains. A survey of retail sales of meats showed that ParknShop's market share increased from 7% in the first quarter of 2001 to 13.8% in the third quarter. Wellcome's market share in the retail sales of meat also jumped from 3.7% to 5.7%. In addition, the two chains initiated discounts to senior citizens. If this program is successful, it may force many small sized grocery stores out of business. Furthermore, ParknShop has recently offered lunch/supper boxes at cut-throat prices of HK\$10 each. This measure is perceived as an attempt to take business away from fast-food chains. In short, Hong Kong's two major supermarket chains are stretching their business portfolio.
- In the face of strong competition, major supermarkets very often offer discounts and tend to transfer the cost to suppliers by requesting lower prices for supplies. Given supermarkets' strong bargaining power as they have many retail outlets, many suppliers have to give supermarkets special discounts which ordinary retailers do not enjoy.
- Almost all Hong Kong supermarkets require listing fees, that is, a fee charged to allow a new product to be put on their shelves. This is a one-off fee for a trial period. The listing fees are extremely negotiable and vary greatly among different supermarket chains. For example, Wellcome and ParknShop which have many branch stores have expensive listing fees. A product with five product ranges is expected to pay US\$26,000 to \$39,000. On the other hand, Jusco, a supermarket in a Japanese department store, charges \$150 for each product. The agent will not bear this cost, so it is transferred to the principal exporter.
- U.S. exporters should be prepared to face trading terms such as promotional discounts (number of discount promotions offered each year); back-end income (flat rebate per year that a U.S. exporter has to pay to the retail chain based on the annual turnover); D.G.A. (Distribution allowance - the fee that the supermarkets charge for distributing the products from its warehouse to its many branch stores); incentive rebate (a percentage of turnover rebated to the supermarkets in case sales exceed the agreed amount). It can be expected that the bigger the supermarket, the harsher the trading terms. For general reference, about 15 percent of the annual turnover has to be rebated to the major supermarkets and 8 percent to small ones.
- In short, all supermarkets require listing fees except those belonging to Japanese department stores. (Jusco is the only supermarket in a Japanese department store that requires a listing fee.)
- All supermarkets except Sogo (a supermarket in a Japanese department store) have trading terms.

- In general, importers or agents have 20 percent mark-up from C.I.F. prices for food with a net profit margin of about 12 to 14 percent. The supermarket chains will mark up about 18 to 23 percent. The mark-up for different products inevitably varies. One example is that a C.I.F. Hong Kong price of a drink is HK\$9 and the retail price is HK\$17.

## B. Convenient Stores

Note: Gas Station marts are not included in this section because they are not significant in Hong Kong. This is a small city and there are not any real long drives.)

### Entry Strategy

- Convenience stores buy goods from local importers and agents. Therefore, U.S. food exporters have to go through Hong Kong importers to have their products sold in convenience stores.
- Listing fees are also required for convenience stores.

### Market Structure



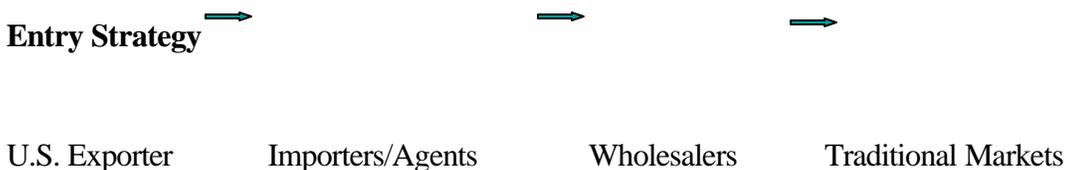
### Company Profiles

Retailer Name	Ownership	No. of Outlets	Locations	Purchasing agent	Year established	Clients' age
7-Eleven	Hong Kong	430	HK	Importers Agents	1981	15-35
Circle K	Hong Kong	156	HK	Importers Agents	1985	15-35

- Convenience stores are characterized by a round-the-clock operation. Since only limited choice of brand names is available and prices are generally less competitive, the buying pattern of their customers tends to be a "fill-in" type, whereby goods are normally bought in small quantities for immediate consumption. There are two major operators of convenience stores in Hong Kong : 7-Eleven Food Store and Circle K Convenience Store. These are ideal outlets for drinks and snacks.
- The average store size of a convenience store is 1,000 sq. ft.

- Listing fees are also required for convenience stores.
- According to a study, Hong Kong can accommodate 1,200 convenience stores. Given that there are about 600 stores presently, there is still room for expansion. The primary strategy of convenience stores is to increase services providing "convenience" to consumers and to increase the number of stores so as to reach economies of scale. 7-eleven, operated on a franchise basis, is able to expand the number of stores quickly. The owners of 7-eleven will increase to 500 stores by early 2004.

### C. Traditional Markets



- U.S. exporters who wish to capture this market segment have to make sure that their importers/agents have good distribution networks to the traditional markets through wholesalers.

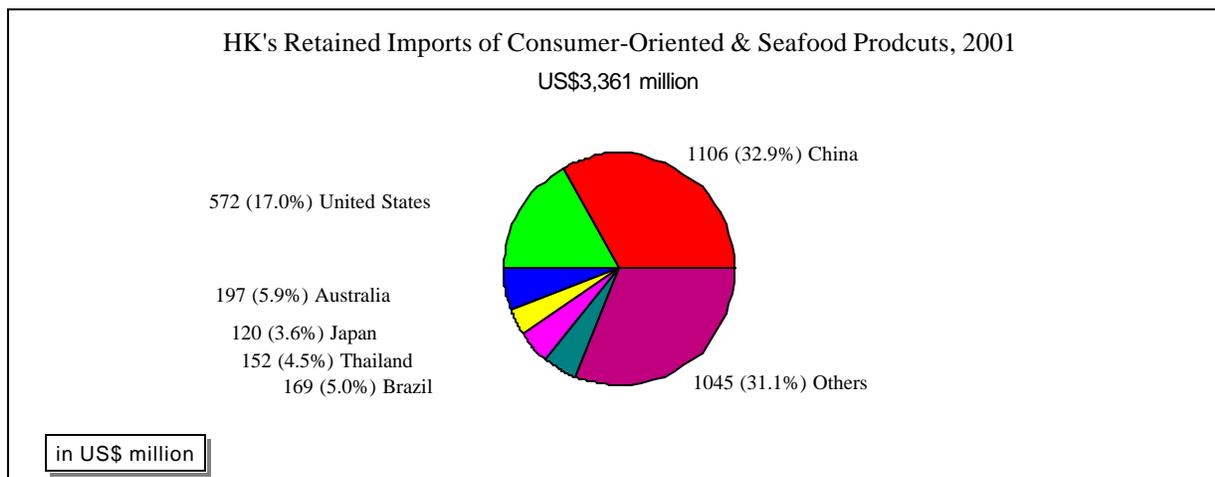
### Market Structure

- Traditional markets include wet markets and mom-and-pop shops. They are widespread throughout the territory. Traditional markets used to account for a lion's share of food retail. For example, they occupied around 54 percent of total retail food sales between 1995 and 1997. Supermarkets sales have exceeded traditional markets sales since 1998 and the dominating trend of the former is likely to persist and enlarge in the future. Despite the growing significance of supermarkets in terms of food retailing, traditional markets remain as key food retail outlets, particularly for seafood, meat and groceries. Wet markets in Hong Kong have changed gradually over the years. The newly built markets are air-conditioned and more hygienic and more environmentally pleasant than the old ones. Some, but not all, stalls in wet markets have freezers and chilling equipment which is necessary to maintain food quality.
- Mom-and-pop shops around the housing estates and schools are ideal retail outlets for drinks and snack foods. One feature of traditional markets is that stalls are small, but the service they offer is personal.
- A traditional mom-and-pop shop which started business in 1990 has expanded to 55 stores spreading all over Hong Kong in recent years. The stores are called Yu Kee, with floor area ranging around 1,500 sq. feet each. They sell mainly processed foods and produce. Most of the food supplies come from Mainland China and South East Asia. They also import snack foods and drinks from Europe. However, U.S. foods are not yet on their shelves. The stores feature cheap prices and are after the mass market.
- Another chain stores worth mentioning is called Magic House. With 72 retail stores, they operate like "convenience stores" except that their business hours are only around 10 hours instead of 24 hours. They primarily sell snack foods, drinks and ice cream.



### III. Competition

- Food production in Hong Kong is not significant. Food supplies rely mainly on imports. Mainland China and the U.S. are the two major suppliers, occupying a market share of 33 percent & 17 percent, respectively. In fact, the market share of U.S. style products is even higher because U.S. branded products manufactured in China are also classified as imports from China. A very noticeable trend in the past year or so, many internationally known branded products, historically associated with and produced in the U.S.A., are now produced overseas, even in Mainland China.
- Hong Kong is a free port and imports from all countries including domestic products compete on a level playing field. The key factors affecting procurement decisions are price, quality and packaging. U.S. products are highly regarded in Hong Kong because of their good quality and consumers' confidence in U.S. food safety. China, due to its geographical vicinity, has the advantage of lower transportation costs.
- Countries like Australia and Canada are very aggressive in promoting a wide-ranging variety of their products in Hong Kong. In addition to the efforts of their consulates to promote products, many provinces also have representative offices in Hong Kong to promote their own products. In-store promotion, menu promotion, trade shows and buyer missions are their usual marketing tools. In contrast to a multi-product approach, the French have focused primarily on the promotion of wine, and Norway on salmon. In recent years, consumer-oriented products from South Korea, Thailand and Taiwan have been vigorously promoted in various supermarkets. Supermarkets in Japanese department stores are particularly keen to promote Japanese products.



**Import Market Share of Major US Exports to HK versus Major Competitors, Jan - August, 2001**

	US\$ Million From US	US Market Share	Major Competitor	US\$million From major Competitors	Competitor Market Share
Poultry	234.25	52%	Brazil	76	32%
Citrus Fruit	76.29	60%	South Africa	17	22%
Variety Meats	39.47	23%	Brazil	36	91%
Nuts	31.77	38%	Iran	37	116%
Frozen Beef	25.33	37%	Brazil	17	67%
Apricots, cherries, peaches, plums	23.96	41%	Australia	17	71%
Apples & Pears	23.71	40%	China	11	46%
Food Preparations	22.94	19%	China	49	214%
Grapes	20.19	19%	Chile	35	173%
Ginseng	17.76	21%	Canada	53	298%
Molluscs	17.00	5%	Japan	98	576%
Frozen Prepared Potatoes	15.29	96%	Canada	0.278	2%
Sausages	14.42	60%	China	8	55%
Sauces	13.94	20%	Japan	19	136%
Prepared Vegetables, not frozen	11.69	40%	China	7	60%
Soups	11.66	69%	Australia	2	17%
Bird's Eggs	10.00	22%	China	26	260%
Preserved Fruits/Nuts	10.00	21%	China	15	150%
Prepared/Preserved Meats	9.50	13%	China	46	484%
Ice Cream	8.66	51%	China	2	23%

**Section IV. Best Product Prospects****A. Products Present in the Market Which have Good Sales Potential**

Please refer to the table in Section III.

**B. Products Not Present in Significant Quantities but Which have Good Sales Potential**

Jan - Sept 2001

	US\$ '000	Growth Rate %	World	Market Share
Pet Food	6,928	5	15,145	46%
Cereals	5,582	15	15,842	35%
Dried Fruits	5,027	77	8,656	58%
Coffee	1,006	47	4,456	23%
Pasta	715	56	70,750	1%
Onions	645	15	4,267	15%
Egg products	519	8	2,309	22%

Flour/Flakes	314	79	5,466	6%
Live Plants	281	36	19,244	1%

### C. Products Not Present Because They Face Significant Barriers

There are no trade barriers for the Hong Kong market.

Foreign Agricultural Service (FAS) Home Page: <a href="http://www.fas.usda.gov">http://www.fas.usda.gov</a>	
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(Food safety control policy) Food & Environmental Hygiene Department Food and Public Health Branch 43 <sup>rd</sup> floor, Queensway government offices 66 Queensway Hong Kong Tel: (852) 2867-5511 Fax: (852) 2893-3547 E-mail: <a href="mailto:enquiries@fehd.gov.hk">enquiries@fehd.gov.hk</a> Home Page: <a href="http://www.fehd.gov.hk">http://www.fehd.gov.hk</a>	(Importation of plants & live animals) Agriculture, Fisheries and Conservation Department 5 <sup>th</sup> to 8 <sup>th</sup> floors, Cheung Sha Wan Government Offices 303 Cheung Sha Wan Road Kowloon Hong Kong Tel: (852) 2708-8885 Fax: (852) 2311-3731 E-Mail: <a href="mailto:afcdenq@afcd.gcn.gov.hk">afcdenq@afcd.gcn.gov.hk</a> Home Page: <a href="http://www.info.gov.hk/afcd">http://www.info.gov.hk/afcd</a>
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