



INTERNATIONAL  
**FRESH  
PRODUCE**  
ASSOCIATION



# Mexico Export Gateway - Japan & Asia Opportunities

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**April 23, 2026 Mexico Time | April 24, 2026 Asia Time**



# TODAY'S SPEAKERS



**Rik Rikimaru**

*Executive Vice President,  
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**Alberto Cuéllar**

*Minister for Asia-Pacific,  
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# MEXICO'S EXPORT REALITY

**\$18.12B**

Mexico fresh produce exports (global)

**\$17.24B**

Exports to the United States

**Mexico's export success is highly concentrated in one market**



Diversification  $\neq$  more  
destinations

Diversification = stronger  
export  
**resilience**



# ASIA IS NOT A MARKET. IT'S A CONTINENT OF MARKETS.



\* Sources: UN World Population Prospects 2024; FAO Statistical Yearbook 2025



# Four Buyer Archetypes, One Continent

## AGING PREMIUM



Japan, South Korea

30.3% of Japan is 65+.  
Quality > volume

## SCALE AND PROTOCOL



China mainland

1.41B people. Protocol-gated, politically managed.

## EMERGING MODERN TRADE



Vietnam, Thailand, Malaysia, Indonesia, Philippines

Median age 25–32.  
Cold chain doubling.

## PREMIUM URBAN HUBS



Singapore, Hong Kong

Small populations, enormous per-capita import spend.



# Your Real Competition Is Next Door



**60%** of Asian produce imports come from other Asian countries

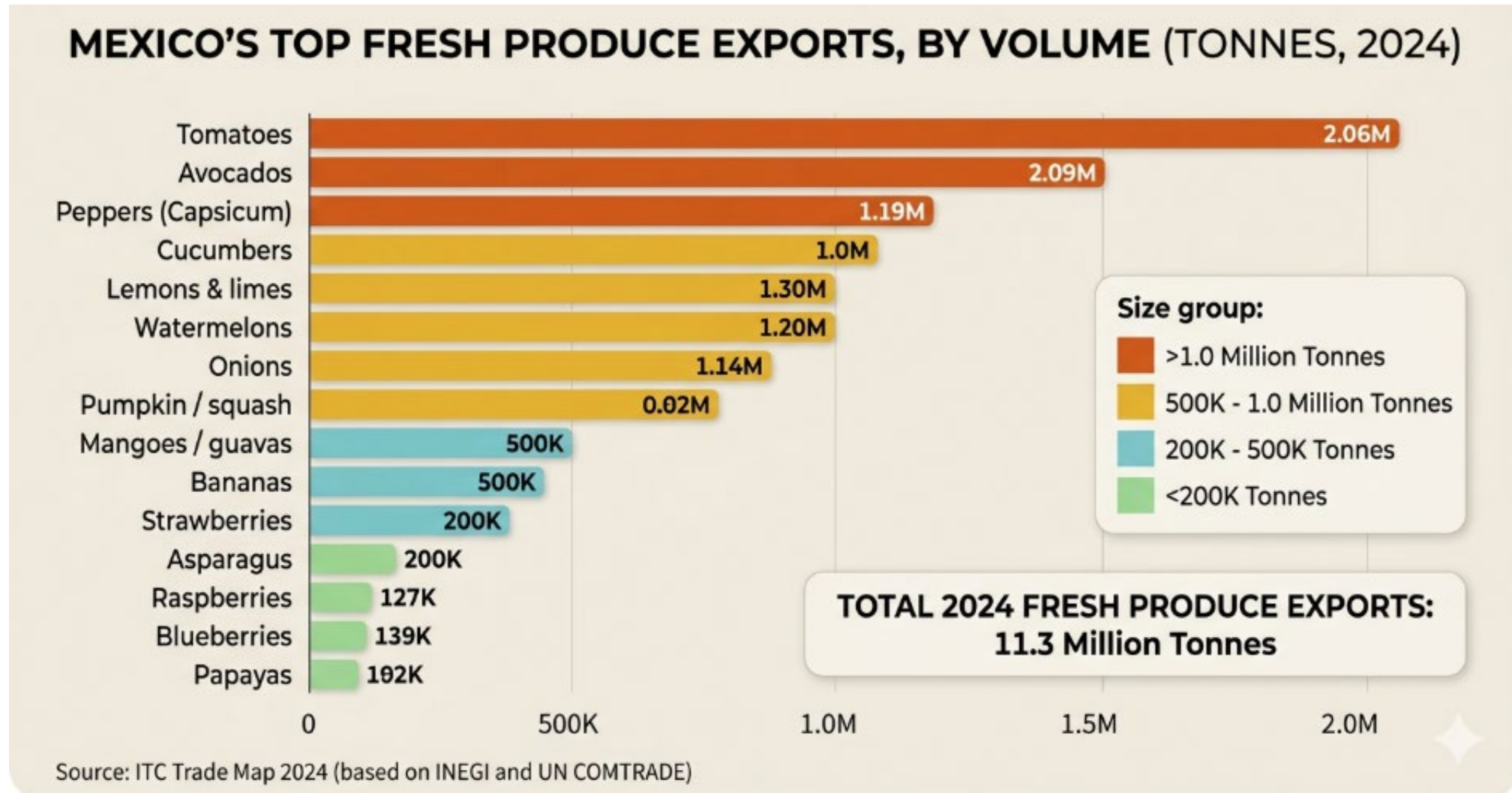
**Top supplier to Japan:** Philippines – nearly 4× Mexico’s total  
~\$1B worth of bananas and pineapples

**Southeast Asia agriculture** = 11.8% of regional GDP; Vietnam 11%, still 27% of the workforce

**China’s grocery retail is restructuring fast:** Sam’s Club revenue since 2020 (USD 688M → USD 17B); Walmart Supercenter down ~45% over the same period



# Mexico's Supply Side: What We Actually Ship





## Japan's Import Demand × Mexico's Supply = The Real Opportunity

Japan Imports	Japan Imports (\$)	Mexico's Supply & Matches
Kiwi Fruit	\$389M – \$423M	New Zealand dominates 97.4%
Pineapples	\$148M – \$157M	Philippines dominates 87%+
Bananas	~\$950M	Philippines dominates ~75%
Avocados	\$143M – \$148M	✓✓✓✓ Mexico is the primary supplier ~75% (facing new competition from Peru)
Pumpkin & Squash	~\$55M	✓✓ Mexico established top-5
Sweet Peppers	\$66M–\$75M	✓ Mexico is the world's leading exporter: Japan's market has high



# Japan: The Anchor Market, and How Mexico Wins

## The Opportunity (High-Level Stats):

- \$3.19B annual fresh produce imports.
- Demographic Shift: 30% of population is 65+ (Quality-first)

## The Structural Edge (The "Moat"):

- CPTPP Tariff Reductions
- Mexico is already a Top-5 supplier.

## The Strategy (How Mexico Wins):

- Focus: Avocados, Squash, Asparagus, Peppers, Limes.
- Strategy: Partner-led entry & Compliance as a "Competitive Moat."

## The Call to Action (The "Pro" Tip):





# Thank you



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