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**Post:** Guangzhou ATO

**Report Category:** Retail Foods

**Prepared By:** Guangzhou ATO

**Approved By:** Jon Flemings

**Report Highlights:**

China continued to be the world's largest food importing country in 2023, with total food imports valued at \$140 billion. The United States was the 4th largest source of China's imports of consumer-oriented agricultural products in 2023. U.S. agricultural products are generally competitive in the China market and sought by local importers and end-users for their high quality. Particularly in the categories of Tree Nuts and Soup & Other Food Preparations, the United States ranked No. 1 in terms of market share among all other exporting countries. Beef, pistachios and almonds, cheese, pet food, wine, non-alcoholic beverages, and ginseng show great potentials.

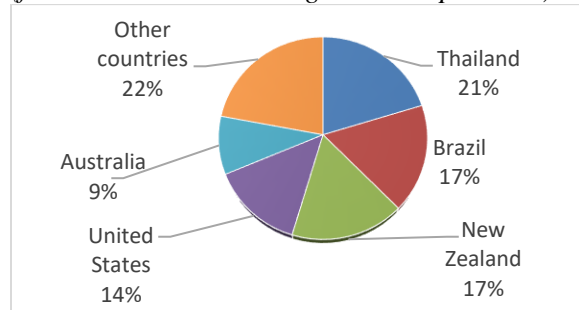
**Executive Summary**

Although China’s 2023 GDP grew 5.2 percent to \$17.52 trillion, the rate of growth is below the ten-year average of 6 percent. U.S. agricultural exports to China totaled \$33.7 billion in 2023, down from \$36.38 billion in 2022. China remained the top market for U.S. agricultural exports.

**Consumer-Oriented Agricultural Imports**

In 2023, China imported consumer-oriented agricultural products worth \$83.77 billion from the world. The United States remained the 4<sup>th</sup> largest exporter of consumer-oriented agricultural products to China in 2023, with \$7.53 billion, down 8.6 percent from 2022.

*Chart 1: Top Exporting Countries to China 2023 (for consumer-oriented agricultural products)*



Source: Trade Data Monitor, LLC

**Food Retail Industry**

Despite concerns over China’s slowing consumer demand, China’s total retail sales grew 7.2 percent in 2023 reaching \$6.69 trillion. The market for food and drinks grew 3.75 percent to \$1.64 trillion.

**Food Processing Industry**

China's food processing industry showed continued growth. The value of China’s food production grew by 2.9 percent in 2023, compared to the previous year. China’s demand for food ingredients is expected to remain strong to support the processing industry.

**Food Service Industry**

China’s food service industry continued to rebound in 2023, exceeding pre-pandemic levels. Revenues of the catering industry reached \$750 billion, up 20.4 percent from 2022. The food delivery market reached RMB 1.5 trillion (\$209.8 billion) in 2023, doubling the size of 3 years ago.

**Quick Facts CY 2023**

**Imports of Consumer-Oriented Products**

\$83.77 billion

**Top Consumer-Oriented Product Imports (by value)**

- 1) Fresh fruits
- 2) Beef & Products
- 3) Dairy Products
- 4) Pork & Products
- 5) Soup and other food preparations
- 6) Poultry Meat
- 7) Processed Vegetables
- 8) Meat Products NESOI\*
- 9) Tree Nuts
- 10) Distilled Spirits

\*NESOI – not elsewhere specified or indicated

**Food Industry by Channels (U.S. billion)**

Retail Food Industry	\$1,640
Food Service-HRI	\$750
Food Processing	\$1,786
Food and Agricultural Exports	\$98.93

**Top 10 Supermarket Chains**

Wal-Mart, Yonghui, CR-Vanguard, Sam’s Club, Freshippo, RT-Mart, Wumart, Lianhua, Metro, Costco

**GDP/Population**

Population: 1.41 billion

GDP: US\$17.52 trillion

GDP per capita: US\$12,681

Sources: China National Bureau of Statistics

**Strengths/Weaknesses/Opportunities/Threats**

<b>Strengths</b>	<b>Weaknesses</b>
- U.S. food products and offer a wide selection and are perceived as high-quality and safe.	- U.S. exports face retaliatory tariffs. - China’s consumer demand has slowed.
<b>Opportunities</b>	<b>Threats</b>
- Consumer demand for healthy products is on the rise. - Growing reliance on online purchase platforms (i.e., Alibaba).	- Strong competition from third countries (i.e., Brazil). - Uncertainty in U.S.-China bilateral relationship.

## Section 1: Market Summary

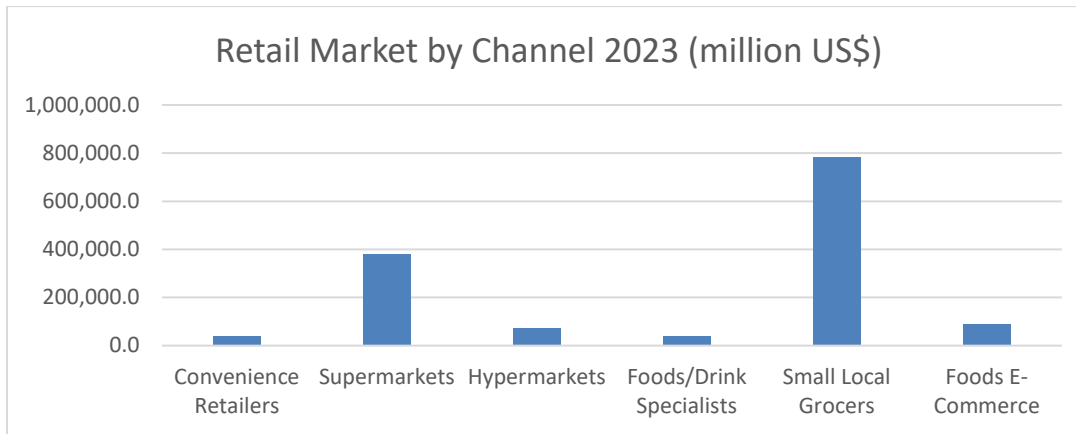
China's gross domestic product (GDP) chalked up a growth of 5.2 percent in 2023 reaching \$17.52 trillion. Retail sales in 2023 totaled \$6.69 trillion, up 7.2 percent from 2022 and outpacing the growth rate for GDP, suggesting gradual recovery of consumption. China has been the world's largest online retail market for 11 consecutive years and online retail sales account for a growing share of total annual sales. In 2023, online sales reached \$ 2.16 trillion and accounted for nearly one third of China's total retail sales.

China continued to be the world's largest food importing country in 2023, with total food imports valued at \$140 billion – 3.1 percent increase from 2022 levels. Amid continuing efforts to diversify its food suppliers, China approved imports of 146 agricultural and food products from 51 countries and regions. Imports of consumer-oriented agricultural products from the United States totaled \$7.53 billion, down 8.6 percent from 2022. The United States was the 4<sup>th</sup> largest source of China's imports of consumer-oriented agricultural products in 2023, accounting for 14 percent of the market share after Thailand, Brazil, and New Zealand.

### Advantages and Challenges of U.S. Agricultural and Food Exports to China

ADVANTAGES	CHALLENGES
U.S. food and agricultural products are perceived as high-quality.	Post-pandemic recovery is slow, as some consumers become increasingly price sensitive.
The U.S.-China Phase One Trade Agreement expanded market access and improved competitiveness for some U.S. exports.	Import requirements for food and agricultural products sometimes lack transparency, scientific justification, and consistent enforcement.
Demand for high-quality food products is on the rise, as the middle class and urbanization expands.	Higher tariffs relative to imports from other countries.
A robust presence by USDA Cooperators and Officials around the country helps to reinforce the reputation of U.S. products as safe, healthy, and high-quality. In addition, this US expertise helps to facilitate trade.	The U.S.-China bilateral relationship lacks certainty, which can influence importers to purchase from other suppliers.

## Retail Sales by Channel



Source: Euromonitor

## Section 2: Road Map for Market Entry

### Entry Strategy

China, with a population of 1.4 billion consumers, is a huge market for agricultural and food products. However, regional differences in dietary, purchasing, and consuming habits makes market research increasingly important. New-to-market exporters are encouraged to target specific consumers and distribution channels. Attending trade shows in China can help you gain market information, gauge interest in your product(s), observe competitors, and meet potential partners. Some noteworthy trade shows are listed in the annually-updated [China Trade Shows](#) report. In addition, trade missions to China are often arranged by State and Regional Trade Group or other cooperators. Trade missions allow participants to have site visits, one-on-one meetings with potential importers, or exhibit at a trade show.

An exporter should begin by familiarizing themselves with China's regulatory environment as well as the regulations, policies, and requirements pertaining to their specific products. (See *Import Procedures* below.) Customs clearance procedures change frequently. When discussing potential sales, exporters should consult with importers, distributors, and retailers to ensure that U.S. products comply with relevant Chinese rules and regulations. These contacts or their import agents should be able to explain and handle customs clearance, quarantine, labeling, and any licensing procedures.

It may also make sense to work through a local business consultant.

### Import Procedures

The FAS Global Agricultural Information Network ([GAIN](#)) system has constantly-updated information gathered and translated by FAS staff on-the-ground around the world, on market access, entry strategies, import procedures, and market trends, etc.

- The [Exporter Guide](#) provides general and updated information on import procedures.

- The [FAIRS Country Report](#) provides information on the regulations and standards applicable to food and agricultural imports, including changes to existing national food safety laws and regulations. In 2023, China released and implemented several new or updated regulations and standards that impact trade.
- With regard to export certification required by the PRC government, please reference the [FAIRS Export Certificate Report](#).
- Since January 1, 2022, China requires all overseas food manufacturers, processors, and storage facilities to be registered with GACC to export to China. For additional information, please see the USDA GAIN reports [Decree 248 Guidance for US Exporters](#), [New USA-Based Registration Applications Under Decree 248](#) and [Decree 248 Product List Update - July 2024](#).

### Market Structure

The agricultural and food retail market can be roughly divided into two categories: online and offline. Online shopping platforms play an essential role in retail sales and now account for a larger share of China’s total retail sales – nearly a third in 2023. In 2023, online retail sales reached \$2.16 trillion, up 11 percent compared to 2022. Five major e-commerce players carry a variety of products, including consumer-packaged foods. Alibaba, which operates Taobao and T-mall, remained the largest in terms of gross merchandise value, followed by Pinduoduo, JD.com, and Bytedance (Douyin).

Offline shops remain important and essential to the Chinese culture. Approximately 40,000 traditional markets (i.e., wet markets, wholesale markets, mom and pop stores) nationwide service approximately 50 percent of the population daily, especially in rural areas and small towns. In addition, many online (e-commerce) companies are operating offline grocery stores – a trend that the industry refers to as "new retail". For example, Freshippo, a supermarket chain that was opened in 2015 and made it onto the Top 5 Supermarket List in 2023, was a subsidiary of the e-commerce giant Alibaba Group.

### Share of Major Segments in the Retail Industry

Type of Retail Channel	2021 (million US\$)	2022 (million US\$)	2023 (million US\$)	2023 Market share
Small Local Grocers	906,209.3	820,550.9	781,382.3	55.7%
Supermarkets	385,340.9	382,505.7	378,374.9	27%
Foods E-Commerce	75,294.8	89,585.6	89,600.4	6.4%
Hypermarkets	83,720.0	77,263.6	71,730.4	5.1%
Food/Drink/Tobacco Specialists	44,583.1	40,368.9	38,757.4	2.8%
Convenience Retailers	35,343.2	38,751.7	38,570.0	2.7%
Warehouse Clubs	3,269.0	3,595.8	4,041.7	0.29%
Discounters	348.6	374.1	367.9	0.03%

Source: Euromonitor

### Company Profiles & Top Host Country Retailers

The sales revenues of the top 100 retailers in 2023 was RMB3.4 trillion (\$475.5 billion), up 3.3 percent from 2022 and representing a strong rebound, considering that 2022 had a 4.2 percent sales decrease. Among the top 100 companies operating convenience stores and shopping malls, most experienced double-digit growth rates, while companies operating department stores experienced 7 percent growth rate. On the contrary, companies operating supermarkets generally experienced a 3.6 percent sales decrease. The top three supermarket chains – Walmart, Yonghui, and RT-Mart – each had annual sales above \$10 billion in 2023.

China’s convenience store business is becoming more concentrated. The top 10 convenience store operators now own more than 63 percent of all stores. Guangdong Province currently has the highest number of convenience stores in China, followed by Shandong Province. Experts believe that an increasing number of convenience stores will be developed in urban areas, including third, fourth and fifth tier cities.

#### Top 10 Supermarket Chains in 2023

Company	2023 Sales (tax included) (\$ billion)	Number of outlets
<a href="#">Walmart</a>	16.81	365
<a href="#">Yonghui</a>	11.97	1,009
<a href="#">RT-Mart</a>	10.8	528
<a href="#">CR-Vanguard</a>	8.75	2,694
<a href="#">Freshippo</a>	8.25	360
<a href="#">Wumart</a>	7.91	1,122
<a href="#">Lianhua</a> (Century Mart)	7.35	3,356
<a href="#">Jiajiayue</a>	4.17	917
<a href="#">Zhongbai</a>	2.86	881
<a href="#">Qiandama</a>	1.92	2,936

Source: China Chain Store & Franchise Association

#### Top 5 Chinese E-Commerce Platforms in 2023

Ranking	E-Commerce Platform	2023 Gross Merchandise Value (\$ billion)
1	Alibaba ( <a href="#">Taobao</a> and <a href="#">T-mall</a> )	1,004.95
2	<a href="#">Pinduoduo</a>	565.75
3	<a href="#">JD.com</a>	495.02
4	Bytedance ( <a href="#">Douyin</a> )	307.69
5	<a href="#">Kuaishou</a>	167.09

Source: Top 100 Digital Retailer List 2023

#### Distribution Channels

Food and agricultural products are sold and distributed through multiple retail channels: e-commerce platforms, offline (brick-and-mortar) retail, and traditional markets (wet markets). Offline retail consists of hypermarkets, supermarkets (including membership-based supermarkets like Sam’s Club and Costco), department stores, specialty stores, and convenience stores.

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Source: Euromonitor

### Sector Trends

A few noteworthy trends in the retail food market:

- **Health-awareness:** Chinese consumers are increasingly health-conscious, paying more attention to the health benefits of the food products they purchase. Health is one of the top considerations in the decision-making process on food purchases. Food products provide or tout nutritional benefits are well-received in the market.
- **Clean labels:** While there is no official definition of what “clean label” means, it generally refers to food and beverage products with short ingredient lists, familiar, natural sounding ingredients, and no artificial ingredients. In line with the increasing health awareness, more and more consumers – especially middle-class members from first-tier cities – are purchasing foods with more clean labels.
- **Plant-based foods:** Plant-based foods have been considered trendy and have represented a growth market for food producers. China’s plant-based food market has grown at an annual rate of 14 percent over the past 5 years, reaching \$13 billion in 2023. Plant-based meat and plant-based drinks have been leading the growth of this market segment. However, regional differences remain. For example, some experts believe the growth trend may be coming to an end in Eastern China.
- **Ready-to-cook dishes:** Ready-to-cook dishes are increasingly popular in China, as consumers living a fast-paced lifestyle want food that is convenient and wholesome. China’s market size of ready-to-cook dishes exceeded \$71.3 billion in 2023, a significant increase of 21.3 percent above 2022.
- **Smaller households:** More and more young people are choosing not to marry. In 2023, one-person households accounted for 16.77 percent of the total number of households in China. It is expected that in 2030, people aged 20-39 living alone could reach 70 million, more than double the number in 2010. The lifestyle and consumption habits of the young, living-alone population would have a huge impact on the retail market. For example, their preference for convenience and their fast-paced lifestyle have created a huge demand for the ready-to-cook dishes, as well as a decreasing reliance on pork consumption.

### Section 3: Competition

China imported consumer-oriented products worth \$83.77 billion in 2023, a slight decrease of 3.3 percent from 2022. Significant import decline took place with Beef & Beef Products (decline of 19.8 percent), Processed Vegetables (decline of 18.9 percent), and Dairy Products (decline of 12.2 percent), while the imports of Distilled Spirits saw a remarkable growth of 24.3 percent. Imports of Fresh Fruits (up 15.8 percent) and Soup & Other Food Preparations (up 15.6 percent) chalked up significant growth as well. U.S. agricultural products are generally competitive in the China market and sought by local importers and end-users for their high quality. Particularly in the categories of Tree Nuts and Soup & Other Food Preparations, the United States ranked No. 1 in terms of market share among all other exporting countries. Yet it faced rather strong competition from Brazil in beef products, pork products, and poultry meat products. In the category of Fresh Fruits, even though China increased imports from the United States in 2023, the United States only accounted for a tiny market share (0.78 percent) in the imported fruit market in China, lagging far behind Thailand (exporting mostly durians), Chile (mostly cherries), or Vietnam (mostly durians). Also, China is diversifying its sources for agricultural and food products by providing increased market access from over 51 countries and regions in 2023. For further information on competition, please read [China Hastens Ag Import Diversification](#).



*China's Major Consumer-Oriented Imports by Category in 2023*

<b>Product</b>	<b>Supplier Market Share</b>	<b>Noteworthy Developments</b>
Beef & Beef Product Imports \$14.4 billion	<ol style="list-style-type: none"> <li>1. Brazil: 41.4%</li> <li>2. Argentina: 15%</li> <li>3. Australia: 11.5%</li> <li>4. United States: 10.6%</li> </ol>	U.S. chilled beef has a significant market share and strong positive reputation in fine dining restaurants.
Dairy Product Imports \$13.36 billion	<ol style="list-style-type: none"> <li>1. New Zealand: 44.5%</li> <li>2. Netherlands: 16.5%</li> <li>3. Australia: 6.7%</li> <li>6. United States: 4.9%</li> </ol>	Whey and modified whey has consistently accounted for the largest portion of U.S. dairy exports to China over the years, with the percentage reaching 37 percent in 2023.
Pork & Pork Product Imports \$6.27 billion	<ol style="list-style-type: none"> <li>1. Spain: 23.9%</li> <li>2. Brazil: 17.2%</li> <li>3. United States: 15.9%</li> </ol>	Among U.S. pork and pork products exports to China, offal of swine (except livers) accounted for a surprising 78 percent.
Soup & Other Preparations Imports \$5.44 billion	<ol style="list-style-type: none"> <li>1. United States: 20.7%</li> <li>2. Australia: 16.8%</li> <li>3. Germany: 10.8%</li> </ol>	Australia is a close competitor to the US in this product category, with some years (like 2018 and 2020) surpassing the US as the No. 1 market leader.
Poultry Meat & Products Imports (ex. eggs) \$4.22 billion	<ol style="list-style-type: none"> <li>1. Brazil: 46.2%</li> <li>2. United States: 19.9%</li> <li>3. Thailand: 12.2%</li> </ol>	The US has been in the No. 2 place since 2020. US poultry paws are highly sought after and are considered superior.
Processed Vegetable Imports \$3.69 billion	<ol style="list-style-type: none"> <li>1. Thailand: 64.5%</li> <li>2. Vietnam: 20%</li> <li>3. Indonesia: 3.3%</li> <li>5. United States: 1.3%</li> </ol>	Processed potatoes (i.e., French fries) accounted for nearly half of all US exports to China in this product category.
Fresh Fruit Imports \$14.7 billion	<ol style="list-style-type: none"> <li>1. Thailand: 38.8%</li> <li>2. Chile: 21.1%</li> <li>3. Vietnam: 18.8%</li> <li>11. United States: 0.78%</li> </ol>	The top three fruits exported from the United States are cherries, oranges, and apples.
Other Meat Product Imports \$3.47 billion	<ol style="list-style-type: none"> <li>1. New Zealand: 31%</li> <li>2. Australia: 23%</li> <li>3. Indonesia: 14%</li> <li>4. United States: 12%</li> </ol>	US exports to China in this product category are almost entirely animal intestines.
Tree nuts 2023 Imports \$3.2 billion	<ol style="list-style-type: none"> <li>1. United States: 29%</li> <li>2. Vietnam: 15.9%</li> <li>3. Thailand: 15%</li> </ol>	The United States has been the top exporter of tree nuts to China for several years. Pistachios and almonds were the major tree nuts exported to China in 2023.
Distilled Spirits 2023 Imports \$2.8 billion	<ol style="list-style-type: none"> <li>1. France: 60.7%</li> <li>2. UK: 18.2%</li> <li>3. Japan: 2.1%</li> <li>8. United States: 0.86%</li> </ol>	Whiskies account for close to 82 percent of US exports to China in this product category.

Source: Trade Data Monitor, LLC

## Section 4: Best Product Prospects

### China's 2023 Top Consumer-Oriented Product Imports from the United States (million USD)

Products	2021	2022	2023	Year-on-Year Growth
Beef & Beef Products	1,344	1,815	1,522	-16%
Soup & Other Food Preparations	937	1,153	1,122	-2.7%
Pork & Pork Products	1,660	985	1,007	2.2%
Tree Nuts	1,048	822	944	14.9%
Poultry Meat & Prods. (ex. eggs)	1,093	1,239	844	-31.9%
Dairy Products	725	773	648	-16.1%
Meat Products nesoi (not elsewhere specified or indicated)	250	498	434	-12.9%
Dog & Cat Food	114	345	376	8.8%
Fresh Fruit	151	99.8	114.8	15.1%
Processed Fruit	86.8	107	75.6	-29.4%

Source: Trade Data Monitor, LLC

### Products with Good Sales Potential

#### - **Beef & Beef Products**

Even though U.S. beef suffered a 16 percent decline in its exports to China in 2023, it has remained the highest-value category in US agricultural exports to China for multiple years. U.S. chilled beef has a significant market share and enjoys strong positive reputation especially in fine dining restaurants in China.

#### - **Pistachios and Almonds**

Over the past 5 years, China's tree nut consumption grew an average of approximately 5 percent annually. Yet, Chinese consumers' per capita consumption of tree nuts is still lagging far behind developed countries, and therefore still has great potential for growth. Pistachios and almonds imported from the United States increased substantially in 2023.

#### - **Cheese**

China's cheese market grew 177+ percent between 2017 and 2022. This growth relied heavily on imports, which increased substantially to \$967.7 million in 2023, with New Zealand accounting for 57 percent of total imports. Chinese consumers' per capita consumption of cheese is just a fraction of their east Asian counterparts in Japan and South Korea, therefore there is significant room for continued growth.

#### - **Dog and Cat Food**

Pet ownership in China has continued to grow. In 2023, there were more than 100 million households in China that had pets. Dog and cat food from the United States is rather competitive in the China market. In 2023, the United States accounted for almost two thirds of China's total

imports (US\$ 573.3 million) of dog and cat food.

- **Wine**

China's imports of wine jumped 22.36 percent in the first 8 months of 2024 compared with the same months of 2023. While wine imports from other major exporters like France, Chile, Italy, and Spain decreased, imports from the United States gained a remarkable 10.63 percent in the first 8 months of 2024.

- **Non-alcoholic Beverages (excluding juices, coffee, tea)**

China increased imports of non-alcoholic beverages from the world by more than 10 percent in 2023. Imports from the United States also chalked up a remarkable 10 percent growth in the same year, making the United States the 6<sup>th</sup> largest import source for this product group.

- **Ginseng**

Effective November 9, 2023, American ginseng (*Panax quinquefolius*) has been approved for use as a food ingredient in China. The new policy could create new market opportunities for U.S. ginseng by-products such as prong, powder, and fiber, which could not previously be exported to China. Additional information can be found in the following GAIN report [American Ginseng Officially Approved for Use as A Food Ingredient in China](#).

## **Product Not Present in Market due to Significant Barriers**

- **Chipping Potatoes**

Chipping potatoes from Idaho, Oregon, and Washington were among several U.S. agricultural products that received new and expanded access under the U.S.- China Economic and Trade Agreement signed on January 15, 2020. China has strong demand for high quality chipping potatoes, which presents a market opportunity for U.S. potatoes. However, PRC storage and disinfection requirements negatively impact the landed costs of U.S. chipping potatoes.

## **Section 5: Key Contacts and Further Information**

### **PRC Agencies Responsible for Food Policies and Import Policies**

- **Ministry of Agriculture and Rural Affairs (MARA)**

MARA is the cabinet-level executive department of the State Council that is responsible for agriculture and rural affairs in the country. MARA implements the guiding principles, policies, and decisions of the Chinese Communist Party (CCP) Central Committee on work related to agriculture, rural areas, and farmers. <http://english.moa.gov.cn/>

- **General Administration of Customs (GACC)**

GACC, the headquarters of China Customs, is a key border agency with responsibilities of traditional customs, as well as border health checks, inspection, and quarantine for imported and exported animals, plants, and their products, imported and exported food safety, and commodity inspection. <http://english.customs.gov.cn/>

**USDA Foreign Agricultural Service Offices across China:**

<b>Organization</b>	<b>Provinces Covered</b>	<b>Telephone/Fax/E-mail</b>
<i>FAS, Office of Agricultural Affairs, Beijing (Manages trade policy)</i>	<i>Entire China</i>	<i>Tel: (86-10) 8531 3600 Fax: (86-10) 8531 3636 <a href="mailto:AgBeijing@fas.usda.gov">AgBeijing@fas.usda.gov</a></i>
<i>FAS, Agricultural Trade Office, Beijing</i>	<i>All other provinces that are not covered by ATOs Shanghai, Guangzhou, and Shenyang</i>	<i>Tel: (86-10) 8531 3950 Fax: (86-10) 8531 3974 <a href="mailto:ATOBeijing@fas.usda.gov">ATOBeijing@fas.usda.gov</a></i>
<i>FAS, Agricultural Trade Office, Shanghai</i>	<i>Zhejiang, Jiangsu, Shanghai, Anhui</i>	<i>Tel: (86-21) 6279 8622 <a href="mailto:ATOShanghai@fas.usda.gov">ATOShanghai@fas.usda.gov</a></i>
<i>FAS, Agricultural Trade Office, Guangzhou</i>	<i>Guangdong, Guangxi, Fujian, Hainan, Yunnan, Guizhou</i>	<i>Tel: (86-20) 3814 5000 Fax: (86-20) 3814 5310 <a href="mailto:ATOGuangzhou@fas.usda.gov">ATOGuangzhou@fas.usda.gov</a></i>
<i>FAS, Agricultural Trade Office, Shenyang</i>	<i>Heilongjiang, Jilin, Liaoning, Inner Mongolia</i>	<i>Tel: (86-24) 2318 1380 2318 1338 Fax: (86-24) 2318 1332 <a href="mailto:ATOShenyang@fas.usda.gov">ATOShenyang@fas.usda.gov</a></i>

**Attachments:**

No Attachments