The Food and Beverage Market Entry Handbook:
The People’s Republic of China:

a Practical Guide to the Market in China for European Agri-food Products and Products with Geographical Indications
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1. The Food and Beverage Market Entry Handbook: The People’s Republic of China

This Handbook is intended to act as a reference for those agro-food producers planning for, or in the process of entering, the Chinese market. This Handbook provides step-by-step guides on the operationalization of the GI market in China including relevant information such as analysis of the Chinese market for different product categories, market access and market entry procedures, IP protection, referrals to professional buyers and a signposting and referral system providing useful contacts and ways to penetrate the Chinese market.

1.1. How to use this handbook

Depending on your stage of market entry, company profile, and product range, different sections within this handbook will be helpful to a different extent for your business strategies.

For those wishing to learn more about the Chinese food and beverage market in general Section 2 European Products and GI Products in the Chinese Market provides an overview of the business climate. This section contains information on: the food and beverage market, market access procedures, customs procedures, SPS and labelling requirements, and the status of Geographical Indicators and Intellectual Property protection. The information contained within this section is of a general nature and so may not be relevant for those in the more advanced stages of market entry.

If Section 2 got you interested in the market but you want to find out more information relevant for your product then check out the Market Snapshots for Selected Products. This content illustrates the market situation, market access procedures, SPS requirements etc. specific for this product or product category. This information will provide more industry specific information to consider as part of any market entry or market expansion strategies.

If you already have decided that the Chinese market is where you want to be, but you need some support, then the Support Services Directory can point you in the right way. Contact information for a service provider, business facilitation support organisation, or from a business contact, could help put you in touch with the right parties who can help you to build your brand in the Chinese market.
2. European products and products with GI in the Chinese market

China has and continues to be an important market for European agricultural producers with impressive growth projections indicating that there will be increasing opportunities for European producers in the future. China’s geographical and cultural diversity is comparable to that of Europe’s whilst regional differences in the level of infrastructure, local and fragmented distribution channels can still pose challenges to those wishing to establish themselves in the market.

Various factors have contributed to an increased demand for high quality imported food and beverages and consumers are becoming more discerning and active in seeking out a wider variety of high quality, unique and safe products. Products with Geographical Indications (GIs), indicating the authenticity, variety, quality, tradition and heritage of the produce, are therefore well positioned to capitalise on market trends in China.

Market Size and Market Share

Consumer expenditure on food increased 35.4% from 2011 to 2014 with projected 5.8% increase in 2015 to a projected total of USD 926,681.2 million\(^1\) (EUR 926,681.7 million) whilst International Grocery Distribution ranked China as the largest grocery market in the world having overtaken the USA in 2012.\(^2\)

Although China is a net exporter of raw agricultural products and commodities it is a net importer of various intermediate and final agri-food products such as meat and edible offal, dairy produce and other edible animal products, animal and vegetable fats and oils, and beverages spirits and vinegars.\(^3\)

EU exports of agri-food products to China have been rising in value from approximately EUR 113 billion in 2010 to EUR 148 billion in 2013 with a positive and rising balance of trade since 2011. Year on year positive growth in the value of EU agricultural exports to China has meant that it is the fastest growing market for EU produce. The market share for EU exports has also been increasing enjoying a 9.1% market share in 2013 with exports consisting mostly of intermediate and final products, accounting for 84% of total exports.\(^4\)

There is a growing market for both domestic and imported products with Geographical Indications as Chinese consumers seek high quality produce. The market for Chinese products with GIs has grown rapidly in the last ten years with the total number of Chinese GI products growing from 323 with a value of approximately CNY 100 billion in 2005, to 1949 products with a combined value of over CNY 800 billion by 2010 (approximately EUR 90.2 billion), whilst by 2013 there were 3210 products with a

\(^1\) China Country Factfile [http://www.euromonitor.com/china/country-factfile](http://www.euromonitor.com/china/country-factfile)
\(^3\) China National Statistics Handbook 2014
combined value of over CNY 1.3 trillion\(^5\) (approximately EUR 158 billion). Sales of European GI products to third countries in 2010 were valued at EUR 11.5 billion with China accounting for 6% of export value for these GIs\(^6\).

**Growth Drivers and Trends**

The growth of the food and beverage market in general and the market for imported and domestic GI products has been driven by a number of factors, most significant of which are the two trends of rising disposable income and urbanisation.

**Diversifying diets**

These two trends have led to an increase in the number of urban consumers and a diversification of diets. Even slight changes in diet can have a major impact on global trade and in line with China's economic development national diets have shown a trend of declining consumption of basic staples such as grains and an increase in the consumption of meat products, dairy products, fresh fruit and vegetables etc.

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\(^5\) "Research on nationwide geographical indications"

\(^6\) “Value of production of agricultural products and foodstuffs, wines, aromatized wines and spirits protected by a geographical indication (GI)” Final report 2012

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Per Capita Purchases of Major Foods of Urban Households

![Per Capita Purchases of Major Foods of Urban Households](image)
Rising Incomes
Disposable income has been on the rise following China’s remarkable economic growth in the decades following the opening up and reform process since the 1970s. Disposable incomes have grown for all earning brackets however this has been at a faster rate than for the middle class and affluent brackets. In 2009 there were 875,000 individuals with personal wealth of CNY 10 million and 55,000 with personal wealth over CNY 100 million, by the end of 2014 these figures stood at 1,090,000 and 67,000 marking increases of .25% and 22% respectively.

![Disposable Income of Urban Households by Income Bracket](image)


As overall increases in incomes have led to diversification of diet, different patterns of consumption can be observed in consumers from different earning brackets. Those consumers at the higher end of the scale purchase more meat, dairy products, and alcohol compared to consumers in lower income brackets. Consumer surveys have also found that those earning more were more likely to agree with the statement that foreign foods and beverages were better, 80% of high income consumers agreed, 70% of medium income consumers agreed, whilst this figure stood at 65% for low income consumers.

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Further increases in disposable income will continue to alter purchases for Chinese consumers with demand for staples such as grain continuing to decline whilst other food categories will enjoy continued growth.

**Food safety concerns and demand for imported foods**

Growing concerns over food safety in recent years has also acted as a catalyst for increasing demand for imported products and demand for products with quality schemes. Food safety was ranked a *very big problem* by 41% of polled individuals in a 2012 Pew Survey meaning it was the third largest area for concern out of the 17 items polled for domestic issues. This is up from 12% who considered food safety to be a big problem in 2008 where it was only the 13\textsuperscript{th} largest area of concern out of the 17 items polled.\(^{11}\) An increase in the number of national food safety standards has come in the wake of recent scandals and product marketing has sought to emphasise safety of products and production methods to allay consumer concerns.

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\(^{10}\) These statistics understate the demand for meat and meat products which is consumed away from home in restaurants, cafés and hotels.

Increased concerns over safety have led to brands with good records to do well and also the increase in interest in products with quality schemes and also for imported produce.

In the wake of recent food scandals a survey of Shanghai consumers found that 48% actively sought out foreign brands whilst shopping whilst 60% prefer restaurants that serve foreign food. Food and drinks brands that have a good reputation for safety should continue to enjoy increased demand in line with consumers prioritising safety.

**Healthier lifestyles and nutritional information**

Chinese consumers are increasingly striving for healthier lifestyles, this has manifested with trends in decreasing spending on unhealthy foods and beverages, and the willingness to trade up and pay a premium for healthier options. In a 2011 study 95% of consumers wanted more information on what was in their meal, whilst a separate consumer survey health was the reason for trading up for 73% of respondents and products to be traded up were fruits and vegetables, all or mostly natural products, and organic food whilst products for trading down were fast food, luxury brands and products, and carbonated soft drinks.

**More competitive imports**

In the long term the competitiveness of imported food in China is expected to rise as consumption grows faster than production. The cost of domestic produce has been increasing due to constraints such as limited land availability, rising input costs, and labour costs. Consumption is expected to outpace production by around 0.3% per year, offering increased opening of the markets for imported produce.

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14 BCG Consumer Sentiment Survey 2013 available at: [https://www.bcgperspectives.com/content/articles/center_consumer_customer_insight_globalization_why_emerging_market_consumers_remain_bullish/?chapter=4](https://www.bcgperspectives.com/content/articles/center_consumer_customer_insight_globalization_why_emerging_market_consumers_remain_bullish/?chapter=4)

Geography and major markets

Geographical Markets:
There is not just one market in China rather there is a collection of small often overlapping markets. For simplicity, these markets are often grouped into four markets: the North, East, South and West. Each of these encompasses multiple provinces and major urban centres. The main entry points for European produce are Beijing, Shanghai and Guangzhou representing the Northern, Eastern, and Southern markets respectively; whilst the Western market is less developed and imports of European produce in these areas are considerably lower.

Urban Markets:
Chinese cities are ranked according to a “tier” system based upon factors such as their population, Gross Domestic Product (GDP), economic growth rate, cultural and historical significance etc. Ranking usually reflects their size market size and the sophistication of infrastructure or distribution channels. Cities classed as tier 1 cities include Beijing, and Shanghai being the most developed, tier 2 cities including Tianjin or Suzhou are less developed but still important markets. Lower tiered cities in tiers 3, 4, and 5 are often grouped together and their growth is often fuelled by manufacturing rather than service industries however these are seen as the drivers of future growth by many domestic and some foreign enterprises.

In general the markets for European produce are more developed in tier 1 cities where there is better infrastructure and more sophisticated distribution channels and there is the largest concentration of affluent or middle class consumers that are the main consumers of European produce. As the markets are better developed for some product categories there may be issues of market saturation and increasing logistics costs, rent, and competition are impacting retailers and distributors negatively.

Tier 2 and in some cases tier 3 cities have the potential to be the main growth markets for the future however there will still be considerable logistical issues such as less well developed infrastructure, fractured distribution channels, and a lack of cold chain storage. Consumer awareness of European produce and average disposable income can also be lower in tier 2 and 3 cities meaning that the market may not be as large initially.

Lower tiered cities are often targeted solely by domestic companies and the challenges faced for establishing effective distribution and marketing for products will be higher than in larger urban centres and demand for high quality European produce will not be as large or consistent as in more developed urban centres.
Snapshots of important markets
There are several important established and emerging markets for European produce within China which offer good entry points into the market or new areas for expansion.

Beijing
As the nation’s capital, Beijing has been driving to become a “headquarters economy” with a high reliance on service industry development. This has meant steadily rising numbers of white collar workers and middle class and affluent consumers. Beijing is the second largest consumer market in China after Shanghai and annual per capita expenditure on F&B was 29% higher than the national average in 2013 at CNY 8,170.

Beijing is a major hub for air freight and has rail links with major shipping centres such as Shanghai and Tianjin. All major retail channels are well established and many have extensive experience with imported produce however competition between retailers can be fierce and market saturation is a concern.

Sources:
China National Statistics Yearbook 2014
Tianjin
A major shipping hub in Northern China with proximity to Beijing and good infrastructure has often meant Tianjin has been seen as an entry point rather than an end market for imported product. Disposable income is not as high as Tier 1 cities however annual per capita expenditure on F&B was 26% higher than the national average in 2013 standing at CNY 7,943.

Traditional retail channels such as Supermarkets and Hypermarkets have been expanding and focusing on trading up the quality of F&B produce to cater to a growing number of high end consumers. As local seafood is of a high quality and cheap demand for imported seafood is low however possibilities exist for other product categories.

Sources:
China National Statistics Yearbook 2014
Tianjin City Review http://www.euromonitor.com/tianjin-city-review/report

Shanghai
Shanghai is both the busiest port in China as well as being its largest consumer market. A high level of development and a large number of middle class, affluent, and ultra-rich consumers make this an important market for high quality imported produce. Annual per capita expenditure on F&B was CNY 9,823, 56% higher than the national average in 2013.

As well as its port facilities air freight handling capacity and well established rail links allow for further transportation into other markets in Eastern China as well as major centres further afield. Retail channels and distribution channels are well established however market saturation and increased costs such as rent and labour costs make it a competitive market for new arrivals.

Sources:
China National Statistics Yearbook 2014
Shanghai City Review http://www.euromonitor.com/shanghai-city-review/report

Guangzhou
Guangzhou’s location on the Pearl River delta and proximity to Hong Kong has contributed to Guangzhou becoming an important shipping hub with the fifth busiest port in the world. Guangzhou has also become an important service centre and manufacturing base and enjoyed 8.5% growth in 2014 and a predicted 8% growth for 2015.

Higher salaries from growing number of value added service industries are offset by higher costs of living however disposable income in 2014 stood at CNY 25,685. Annual food and beverage expenditure (including cigarettes and alcohol) increased 11.1% from 2013 to CNY 8069 per capita in 2014.

Wholesale markets in Guangzhou play an important role in distribution of products at the provincial and national level aided by a developed river, rail and air transportation infrastructure.
Sources:
Guangzhou City Review [hyperlink]
http://baike.baidu.com/subview/6771/10628575.htm#7
http://news.163.com/15/0128/12/AH213TKR00014AED.html

Chongqing

The provincial capital of Sichuan and an important urban centre on the boundary of Western and Central China and grew by an impressive 10.9% in 2014. Disposable incomes are not as high as in coastal cities and annual per capita expenditure on F&B was just 15% higher than the national average, however this did account for 39.2% of disposable income.

Given its strategic placement upon the Yangzi river and as a hub for trade flows between Central and Western China there are well developed rail, road, air, and waterway transportation networks in place. With an increased focus on developing China’s Western regions Chongqing could be set to benefit from further growth and infrastructure development.

Sources:
China National Statistics Yearbook 2014
http://baike.baidu.com/link?url=EwEpnkyv9PgZsPhhGZfBki1KPhZWlpVyz98jOcjdWlqcH4-FanBoQu9wjMflZwBFJLUhvPsIoySOLLzpJbIlp78uVlrpgk7LjCc0VRqQ_

Wuhan

An important centre for manufacturing and logistics due to its location on the Yangzi and Han river ways and on the border of Northern and Southern China Wuhan has seen impressive growth in recent years and is increasingly international in its development perspective.

Whilst salaries are lower this is counteracted by lower costs of living leaving middle class and affluent consumers with disposable incomes comparable to other tier 2 cities. Average disposable income grew 9.9% in 2014 to CNY 33,270 whilst annual per capita expenditure on F&B in 2014 grew by 9.1% to CNY 6,976.

Wuhan is a potential growth market for products already established in China but more challenging for distribution, retailing, and marketing as brand awareness will be lower and domestic competition fierce for products aimed at price sensitive consumers.
Sources:
http://hb.qq.com/a/20150216/011579.htm
http://baike.baidu.com/link?url=gyqBQD0ed0wMoQ6UgW79LWrg0rhLiHNzEG4DLSNBSQKNBEOhl92xagnuq5WMCr-ftMUKWmi6Erd7KgVX6WW0JIP8WHUUF4bxXeVwqmF-7Eq

N.B. The above snapshots are non-exhaustive and are meant to act as a starting point for individual research on potential markets within China.

Distribution and Logistics
Logistical planning for transport of European produce to China is complex and requires an end-to-end understanding of the supply chain as well as of the considerations and challenges that will be faced.

Transportation Infrastructure
Transportation times and costs vary upon the mode of transportation selected and goods destined for non-coastal regions or lower tiered cities may require a combination of two or more means of transport to reach the market.

Shipping: The main method for transporting goods from Europe to China is shipping by sea with main ports of entry in China being: Shanghai, Shenzhen, Ningbo-Zhoushan, Qingdao, Guangzhou, Tianjin, Dalian, Xiamen, Lianyungang and Suzhou. Although shipment can continue along the major waterways of China alternative means of transport such as rail should also be considered once products have reached a major coastal port. Shipping from Europe to China can take upwards of one month to coastal ports and is therefore suitable for produce with long shelf lives.

Air freight: Handling capacity for air freight is concentrated in tier 1 cities such as Beijing, Shanghai, and Guangzhou however investment and development initiatives for civil aviation in China are improving the number and capacity of provincial and local airports. Due to high costs air freight is often only economical for low volume high value goods and for goods with a short shelf life.

Rail freight: The domestic rail system is the focus of investment with new high speed lines connecting major urban centres and also focussing on upgrading provinces in Western China with 19,700 km of new line built between 2008 and 2013. Connections with Europe have been developed by several Tier 2 cities such as Chongqing, Chengdu, Wuhan, and Zhengzhou. Transport from Europe can take between two and three weeks although these times may be reduced if lines are upgraded. The Chinese government at both the central and local levels will continue to support further development of rail lines potentially increasing the role of rail transportation for import.

16 Chinese Port Online: http://www.chineseport.cn/bencandy.php?fid=47&aid=177710
17 FCO Country Update, April 2013
Distribution Channels and Intermediaries

Wholesalers, agents and brokers and professional logistical support service providers in China can assist in developing the correct strategy for the market. When correctly used an agent working for commission or a distributor making margins on final sale price can help reduce market entry costs and time required. These potential benefits however must be weighed against possible downsides of additional costs, less control over marketing and sales as well as protection of intellectual property rights.

When selecting an intermediary due diligence should be performed and various factors need to be considered when evaluating the suitability of any potential business partner. Factors such as:

- Company size and ownership – especially whether it is privately owned, a WFOE, or a SOE
- Customer feedback and references
- Professional accreditation of the service provider
- Regional coverage for distribution
- Types of outlets and organisations covered
- Logistical capacity such as warehousing, transportation and cold chain storage capacities

Retail Channels

Imported produce from European can make use of several different retail channels each of which with their own advantages and disadvantages. Understanding the potential of various retail channels is important for understanding the market and shaping entry strategies accordingly.

Hypermarkets: Foreign operators play a major role in the hypermarket segment and by combining multiple stores, restaurants, cafes and other amenities these have managed to successfully attract middle class consumers. Operators often have a high degree of familiarity with foreign brands and often can effectively promote these products however constraints include limited total stock keeping units (SKUs) for imported products and price sensitive consumers.

Supermarkets: Domestic enterprises dominate the supermarket segment and the market is less consolidated than for hypermarkets. Many supermarkets are introducing or expanding the number of upmarket lifestyle stores which contain a higher proportion of imported products and sell products at a premium. In lower tiered cities imported foodstuffs are present but usually those already well-established in the Chinese market place. Supermarkets may deal directly with producers or importers but usually rely more on wholesalers and distributors.

Specialty or boutique stores: Primarily located in tier 1 and 2 cities and targeting affluent consumers and expatriates these stores often stock specialty items not found elsewhere in the Chinese market. With large total of SKU dedicated to imported products and customers willing to pay a premium these can act an entry point for high-end agri-food produce. Whilst the number of these stores is increasing geographical distribution is currently limited and volumes of sales are low compared to Supermarkets and Hypermarkets.
Convenience stores: Growth of convenience stores is slowing in tier 1 cities where saturation is becoming an issue however there are low concentrations in lower tiered cities. The sector consists mostly of domestic operators however international operators also have an established market share. Imported products are available however these will tend to be ready to consume products in the low to mid-price range and SKU will be limited.

Hotels, restaurants, and cafés: Catering to a wide range of consumers, these venues have been able to increase exposure to European produce and build awareness of high quality foods and beverages. Tier 1 and 2 cities have high concentrations of high-end venues however mid-range venues, café chains and fast food chains are expanding in lower tiered cities. High end restaurants and hotels have seen slow growth due to austerity measures restricting official dinners and banquets and may be hesitant to procure premium products. Difficulties can arise if F&B managers of smaller operators fail to pay, or pay at irregular intervals for products and often operators will deal solely with wholesalers and distributors rather than with importers or producers.

eCommerce: B2B, B2C and C2C platforms have all grown rapidly in recent years and younger tech savvy consumers are increasingly turning to eCommerce in favour of bricks and mortar retail outlets. Imported F&B products are already dealt on some platforms and when conducted via free trade zones requirements such as Chinese labelling are not required lowering operational costs for producers. Difficulties can arise with the issue of counterfeit products on platforms and poor service from outsourced logistics and delivery companies.

Difficulties
Capacity issues for cold chain storage mean that the movement of perishable goods can be challenging and retailers accordingly operate local distribution with limited national distribution of non-perishable products. Getting fresh European produce to consumers in markets away from the major entry points (Beijing, Shanghai, and Guangzhou) therefore remains a challenge.

Selecting a local or international partner and intermediaries to work with requires careful consideration and research on the part of producers as despite regulation by the authorities due diligence is still required to minimise the risk of scams and abuses. Disputes with or underperformance from agents and other intermediaries can also damage sales or add to operating costs for producers.

Retailers are often cautious of overstocking and so there may be less predictability for time gaps between product selling out and restocking. Whilst this is primarily a concern for importers and distributors it can also have knock on effects especially for products with shorter shelf lives.

Whilst distribution and retail has become more consolidated and sophisticated in recent years it is still less consolidated than in European markets. The market share and ranking of various industry leaders in the above channels will vary between different regions and also on a city by city basis and navigating this landscape can be costly when entering or expanding in the Chinese market. Market research on target markets is key for ensuring that the best retail channels are used for your specific product.
Trends
Several important trends are altering the retail landscape in China in response to increased competition in more developed markets, more investment in infrastructure, and increased access to the internet.

- The number of small independent stores and wet markets has been on the decline as retail channels become more consolidated.
- Supermarkets and hypermarkets are showing positive growth however due to increased competition and costs operators are repositioning with several large chains have been closing underperforming stores in tier 1 and 2 cities.
- eCommerce is on the rise with both B2B and B2C platforms performing well with the recent introduction of cross border eCommerce via free trade/bonded zones opening up new opportunities for foreign producers.
- Specialty and Boutique stores as well as high end lifestyle stores are increasing to respond to increased demand from increasingly sophisticated consumers.
- Restaurants targeting mass consumers in the wake of austerity measures.

Business Contact Database:
A database of importers, wholesalers, retailers and distributors can be found in Annex II.

N.B. due diligence will have to be performed for any contacts on this database as no warranty is given as to the standing of these individuals, organisations or firms and no corresponding responsibility or liability is accepted by the authors.

Consumer profiles
Despite growth rates slowing in China the impact of Chinese consumer spending is not anticipated to drop, as disposable income is rising and consumers are becoming more sophisticated. These trends combined with an inherent desire to trade up has meant that there are more and more Chinese consumers now willing to pay a premium for higher quality products in general including for high-quality, authentic, imported foods.

Although consumer trends can vary at a regional or city by city basis, consumers in general can be categorised according to their socioeconomic status which often determines their motivation for purchasing European produce as well as the modes of consumption. For certain product categories the factors influencing modes of consumption may vary and these differences will be raised in the respective sections on product subcategories.

High net worth individuals: these consumers are usually the first or second generation of China’s social elite with high disposable incomes and predominantly concentrated in China’s tier 1 and 2 cities. In 2014 there were approximately 1,090,000 millionaires (with a personal wealth of CNY 10 million) and 67,000 super rich individuals (with a personal wealth of CNY 100 million) concentrated mostly in Beijing,

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19 Retail Market in China September 2013 Fung Business Intelligence report
These consumers see European high quality goods as a marker of taste and will purchase high quality products as part of their conspicuous consumption.

Knowledge of products may be limited and these consumers will often be drawn to well-known brands that come with high price tags and consumption can be occasional or frequent depending upon individual lifestyle. As exclusivity appeals to affluent consumers retail channels such as hypermarkets or supermarkets are less likely to be utilised compared to boutique or specialist stores or purchases made in hotels, restaurants and cafés. Marketing campaigns for products targeting these consumers often emphasise the exclusivity of the product or themes of success and luxury and this segment can often act as trend setters for other social segments.

**Affluent consumers:** with less disposable income than their high net worth counterparts but with higher earnings than middle class consumers, the affluent consumer represents the upper end of the middle class and are an important demographic in both higher and lower tiered cities. Earnings will have risen to an inflection point where the affluent consumers will be focussed on trading up and do not mind paying a premium for this, foreign products and brands can be a means of attaining higher quality and can therefore be highly desirable. More and more affluent consumers are travelling studying or working abroad and with exposure to European food and drinks culture they are more likely to have adopted new eating and drinking practices as well as a preference for high quality imported products.

Affluent consumers may purchase imported food and beverages on a frequent basis where these products play an increased role in nutritious intake and the range of products purchased will encompass both luxury products as well as daily staples. Purchases are made in both larger retail channels such as hypermarkets and supermarkets as well as in more specialist stores. Increasing concern of healthy lifestyles and a desire for high quality and safe produce should be accounted for in marketing as products that are perceived as unhealthy or marketed as being luxuries may suffer as a result of spending cuts in these areas.

**Middle class consumers:** are an important demographic in tier 1 and 2 cities as well as having significant purchasing power in tier 3 and 4 cities where lower salaries are offset by lower living costs. Although definitions can vary those consumers who have an income of over CNY 60 thousand and are home and car owners reached 104 million in number by 2011. Factors such as increasing disposable income, more exposure to European food and drinks often from eating out at restaurants with Western or fusion cuisine as well as increased concerns over food safety, and a desire to trade up in purchases have all meant middle class consumers see European produce as increasingly attractive.

These consumers may purchase more expensive products on an occasional basis if they are savvier in their spending or have specific preferences picked up from previous dining or travel experiences, they will also purchase mid-price range products more frequently for daily or frequent consumption. The range of products may be more diverse than other consumer groups with imported products playing a larger role in changing diets. Where these consumers have increased awareness of the food and drink

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21 “Doing Business in China” International Market Advisor, China Britain Business Council, UK Trade and Investment
culture purchases will be more targeted and made in retail channels such as specialist or ‘lifestyle’ supermarkets whilst mid-price range products may be purchased in large hypermarkets or other traditional retail channels. Marketing should tap into the dual desire for trading up and also for healthier lifestyles with quality and safety assurances.

**Young consumers**: born in the 1980s or 1990s and having grown up in an increasingly outward looking China and cosmopolitan cities and with widespread access to the internet the new generation of consumers have had large exposure to Western culture and products. This demographic is the most likely to have adopted certain Westernised eating or drinking habits and are increasingly open to try new products.

Consuming products on an occasional basis they are also more likely to purchase products in the lower or mid-price range and are also more likely to use eCommerce rather than traditional retailing channels when purchasing food and beverage products. Although they may not have the disposable income to be as lucrative a demographic as affluent or white collar consumers these will be the next generation of consumers and building brand awareness now can lay the foundation for future sales in hand with future desires to trade up.

**Middle aged or senior consumers**: are more cautious in their purchasing behaviour than their younger counterparts and will place less emphasis on trading up and have less inclination for purchasing imported products as part of evolving lifestyles. The status of high end imported products does still resonate with senior consumers and they will still view these products as suitable for gifting purposes or for use at special occasions such as holidays therefore purchasing less frequently than other consumer types.

As they are generally less tech savvy than their younger counterparts eCommerce is not a significant retail channel and the majority of purchases will be made at ‘wet markets’ (large open air markets) and supermarkets. As European products may also be consumed alongside traditional dishes or drinks raising awareness of how best to pair products with dishes is important for marketing success.

**Female consumers**: whilst female consumers are included in the categories above female consumers differ from their male counterparts in several key areas. Notable differences in an increased value placed on safety and quality of products, an increased focus on spending for children, as well as different tastes for certain products such as a preference for wine over spirits and more fruit and vegetables compared to meat based products.

As education opportunities and earning power continue to rise for women in China understanding these preferences will be increasingly important. Although by no means universal, nor as prevalent today as in the past, women in China have often managed household finances; market research should therefore not underestimate the importance of female consumer preferences.

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22 As much as 30 to 40 percent of household income is dedicated to childcare and for food and beverages
Cultural Sensitivities and Other Considerations

Cultural sensibilities can play as important a role as other considerations when it comes to purchasing trends in China whilst understanding other social factors within China that shape consumer behaviour and trends can be the key to successfully marketing products.

Colour associations and packaging

Red is traditionally a lucky colour and high end food and beverage products often come in red packaging especially when sold during holidays such as Chinese New Year (Spring Festival). White is traditionally associated with funerals and while there are more recent associations such as with the increase of white weddings, with the exception of certain dairy products food and beverage packaging is rarely wholly or predominantly white.

Ethnic diversity and cultural sensitivities

Although China is predominantly Han (汉族) there are over 50 recognised ethnic minorities within China, whilst many of these ethnic minorities are culturally integrated with similar preferences for food and beverages there are still some important cultural sensitivities that should be borne in mind. Both the Hui (回族) and Uighur (维吾尔族) ethnic minorities, predominantly located in China’s Western regions with communities in large urban centres for other areas, are Muslim, and certain products such as pork and alcohol are not permitted in their halal diets. Prior to entering a new market research should access if dietary restrictions for other minority groups will have a significant effect on the local market.

Pairing of foods and drinks

Food and beverages are often paired to complement each other’s flavours and to maximise perceived health benefits. Individual ingredients will be categorised according to their mode of preparation and properties with oily food, meat, spicy food, or sweet food, being classified as “heating”; whilst foods such as vegetables, food with sour flavours, and with low calorific value, are classified as being “cooling”. Dishes or combinations of dishes that are not balanced according to this system are seen as unhealthy and where consumers do not know how best to complement a European ingredients or products they may be hesitant to purchase them.

Fusion cuisine

Chinese cuisine has proven itself fast to adopt and localise new and foreign ingredients and dishes for Chinese palates. Western restaurant chains and franchises that have expanded in China have often been flexible in their marketing strategy adapting their fare for Chinese consumers. Although the European heritage and traditions of PDO and PGI products appeals to many consumers, providing recipes or demonstrating how products can be paired with traditional Chinese dishes can

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increase exposure to a wider range of consumers.

**Eating in vs. dining out**

Dining out in China is popular when compared to many other countries with 85% of Chinese consumers dining out at least once per week. It is important to note that growing incomes have led to an increase for meat consumption for food away from home with higher income groups showing a significant increase in consumption of pork, beef and poultry.

Chinese consumers are also more likely to purchase European products when dining out at Western restaurants, cafés or hotels as holding Western style dinner parties is not a common practice and does not enjoy the popularity of dining out at restaurants. When there are occasions for large gatherings and cooking at home, such as Chinese New Year, traditional foods remain the norm although the gifting of quality food products, such as wine, spirits, confectionaries, or cheese, has grown in popularity in recent years.

**Gifting**

The gifting industry was valued at RMB 800 billion in 2013 and whilst the range of gifted products is wide, food and beverages make up a significant proportion of the industry. Food and beverages are frequently given as gifts during Chinese holidays and on other important occasions with imported products often purchased specifically for such a purpose. The packaging and branding of products is especially important when aiming to capitalise on this market with products purchased for gifting often being individually presented with elaborate packaging.

Gifting was so prevalent that the practice was targeted as part of ongoing austerity measures and anti-corruption campaigns initiated by Xi Jinping in late 2013. Marketing of both Chinese and foreign high end products has shifted in response away from themes of luxury and orientated towards success. Whilst gifting may be less prolific in certain business and official settings and ultra-rich are curbing their spending demand still remains strong during the holiday seasons driven by ordinary consumers although the value of gifted products may still remain lower than pre-2013 levels in the short term.

**Chinese New Year Purchases**

The largest and most significant holiday in the Chinese calendar has become an important time of the year for retailers. Consumers are spending ever increasing amounts on nianhuo (New Year products) with imported food taking up an increasing share of nianhuo purchases. Online retailer YHD, majority owned by Walmart Stores Inc, reported that imported food and drink

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25 "Meat Demand in Urban Chinese Households” USDA GAIN report February 2012


27 Super rich continue to cut back on gifting [http://www.chinadaily.com.cn/cndy/2015-01/30/content_19445690.htm](http://www.chinadaily.com.cn/cndy/2015-01/30/content_19445690.htm)
accounted for 37% of nianhuo purchases in 2013 and 47% in 2014. Total sales in 2014 increased 100% from their 2013 levels and the range of products available grew from 14,000 to 70,000.²⁸

Womai, the e-commerce platform owned by the China National Cereals, Oil and Foodstuffs Corp, predicted that its sales of imported products in 2015 would triple the level reached in 2014 with demand driven by families in tier 1 cities.²⁹ The purchases made for Chinese New Year differ from gifting in that they can be done for family consumption and cooking rather than for business purposes and whilst concerns of “face” are still applicable products are more likely to have mid-price points.

Brief Market Snapshots providing more specific information on: market size, market share, geography, distribution and retail channels, and consumer profiles and cultural sensitivities are available for a range of product categories namely:

<table>
<thead>
<tr>
<th>Wines and Vermouth</th>
<th>Spirits</th>
<th>Beer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresh and processed meat</td>
<td>Olive oil</td>
<td>Fresh fruit and vegetables</td>
</tr>
<tr>
<td>Processed fruit and vegetables</td>
<td>Dairy products</td>
<td>Processed cereals</td>
</tr>
<tr>
<td>Bread, Pastry, Cakes, Biscuits and other Bakers’ Wares</td>
<td>Confectionary</td>
<td>Honey</td>
</tr>
<tr>
<td></td>
<td>Live plants</td>
<td></td>
</tr>
</tbody>
</table>
2.2 Market access and market entry

This section provides details on the requirements for entry into the market explaining: where market access restrictions exist and what protocols and procedures need to be in place, company level registration required prior to export.

Market Access

Certain product categories are subject to market access restrictions and require protocols and procedures to be in place at the national level between the country of origin and the People’s Republic of China (PRC).

Product categories requiring protocols and/or sanitary certificates to be in place include:

- Meat and meat based products
- Livestock
- Dairy products
- Fruits
- Vegetables
- Fish products
- Hides and Skins

Other products such as wine, olive oil etc. do not require protocols to be in place but conformity with general requirements established by the Chinese Government is required for the export process.

Country Level

If your product category is subject to market access restrictions you must check that your country is able to export these products to China:

Your country must have a Bilateral Agreement in place with the PRC

These protocols are negotiated between the relevant authorities within the country of origin and AQSIQ who will evaluate technical material to access the animal health status of the exporting country. This comprises of risk analysis evaluating the laws and regulation, the veterinary health service structure, quality management control system, detection and monitoring of animal epidemics.

Following the satisfactory conclusion of in-situ evaluations the Chinese authorities will initiate high level talks to cover the content of the protocol between the two countries, and also to discuss the format of sanitary and phytosanitary certificates.

Your country must have a Sanitary Certificate available

These certificates will be agreed and implemented after a protocol has been signed and can take upwards of 6 months to be finalised.
Establishment Level
At the establishment level registration with the General Administration of Quality Supervision, Inspection and Quarantine (AQSIQ) is required for all producers wishing to export to China with additional registration required for other product categories:

Your company must have completed Foodstuff Exporter Registration

Registration for Exporters and Agents Overseas
Registration for exporters and overseas agents can be done online at: http://ire.eciq.cn/entire/

Instructions in English and Chinese are available for download at: http://ire.eciq.cn/

The importer, must have completed Foodstuff Importer Registration
The registration process is similar to that for Exporters however this must be filled in in Chinese. The importer is often a local Chinese partner, or a trade company, however European Producers can act as exporters and importers by establishing a Wholly Foreign Owned Enterprise (WFOE) in China.

Registration for imported food consignees within China
Registration for foodstuff importers within the PRC can be done online at: http://ire.eciq.cn/conire/

Instructions in English and Chinese are available for download at: http://ire.eciq.cn/
Other products may require additional registration with the AQSIQ and Certification and Accreditation Administration of the People's Republic of China (CNCA) of production plants of exporters i.e. for dairy and meat producers. This registration process can include on-site visits from Chinese officials and bilateral cooperation between the relevant authorities within your products’ country of origin and with CNCA.

Click here for more details on dairy product exporter establishment registration.

Click here for more details on meat and meat product exporter establishment registration.
<table>
<thead>
<tr>
<th>European Union Member State</th>
<th>Pork Meat</th>
<th>Poultry Meat</th>
<th>Dairy Products</th>
<th>Fruit and Vegetables</th>
<th>Aquatic Products</th>
<th>Hides and skins</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Belgium</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes$^1$</td>
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<td>1. Pears</td>
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<tr>
<td>Bulgaria</td>
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<td>Cyprus</td>
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<td></td>
<td></td>
<td>1. Citrus</td>
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<td></td>
<td>Yes</td>
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<td>Yes$^1$</td>
<td></td>
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<td></td>
<td>Yes</td>
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<td>Yes$^1$</td>
<td></td>
</tr>
<tr>
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<td>Yes</td>
<td></td>
<td>Yes$^1$</td>
<td>Yes</td>
<td></td>
<td></td>
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<tr>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spain</td>
<td>Yes$^1$</td>
<td></td>
<td>Yes$^2$</td>
<td>Yes</td>
<td>Yes$^2$</td>
<td>Yes$^2$</td>
<td>1. Boneless salted pork and other products, 2. Citrus fruits</td>
</tr>
<tr>
<td>France</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes$^1$</td>
<td>Yes</td>
<td>Yes$^1$</td>
<td>Yes$^1$</td>
<td>Apples and kiwi fruit,</td>
</tr>
<tr>
<td>Finland</td>
<td>Yes$^1$</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Market access was granted in January 2015</td>
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<td></td>
</tr>
<tr>
<td>Ireland</td>
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<td></td>
<td></td>
<td></td>
<td>Yes$^1$</td>
<td>Yes$^1$</td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td>Yes$^1$</td>
<td></td>
<td>Yes$^2$</td>
<td></td>
<td></td>
<td>Yes$^2$</td>
<td>1. Boneless salted pork only, 2. Kiwi fruit,</td>
</tr>
<tr>
<td></td>
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<td>Luxembour</td>
<td>Latvia</td>
<td>Malta</td>
<td>Netherlands</td>
<td>Poland</td>
<td>Portugal</td>
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<td></td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

1. From the 13th of February 2014 restrictions on the import of pork were in place due to concerns of African Swine Fever (ASF).

The above information is accurate as of Q1 2015 producers are advised to check with their relevant national authorities and official Chinese websites for the latest information.

2.3 Customs, SPS Requirements, and Labelling

Customs procedures and conformity with Chinese standards and requirements can be a challenge for EU producers exporting to China. Regulations can be complex and can frequently be amended or replaced making it crucial to keep abreast of the most recent developments and seek professional assistance from partners with the necessary expertise.

This section provides a brief overview of the general customs procedures and some of the technical requirements such as SPS measures and labelling requirements for food and beverages. Where this is different from general requirements product category specific information on customs procedures, SPS measures, and labelling requirements is available for select product categories covered in section 3.

Before making enquiries on logistical arrangements check that your product can be exported to China and that learn more about company registration to export to China.

Customs Procedures and Documentation

Customs procedures:

Compliance with customs procedures can appear difficult for companies entering the market for the first time, however, suitable partners can offer assistance in all steps of the import procedure to help you get into the market.

It is important to comply with all Chinese requirements and standards as non-compliance can lead to the rejection of products and in serious cases in criminal proceedings. In 2014 3,503 batches of food products were blocked from entry into the Chinese market with the main issues being incorrect labelling of products, poor quality of products and additives.30 Customs officials’ suspicions of under-pricing of products in customs declarations led to the detention and investigation of importers.31

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Protocol Negotiated between the Country of Origin and the PRC

Agreement following technical meetings. Upwards of 6 months after protocol signed.

Foodstuff Exporter Registration

Foodstuff Importer Registration

Additional Registration e.g. for dairy products

Customs Registration

Commodity Inspection

Customs Declaration

Submission of Documents

Customs Inspection

Tariffs and Taxes

Customs Clearance

Distribution

Retail Channels

Negotiated between the Country of Origin and the PRC

Agreement following technical meetings. Upwards of 6 months after protocol signed.

Registration with AQSIQ and administered by CNCA is done prior to export of goods.

Labelling must comply with relevant National Standards

Inspection of labels will be performed by CIQ

If inspection and quarantine Results are compliant, the Local Office will deliver an Inspection and Quarantine Certificate for Inbound Commodities.

If results are non-compliant, the CIQ office will issue a notice of inspection and quarantine actions requiring the products to be returned or destroyed.
Documentation:
The following is a list of the documentation generally required to be prepared by exporters of F&B products to China to prove compliance with export requirements:

- Commercial Invoice
- Packing List
- Certificate for Registration of Foreign Exporters of Foodstuffs
- Certificate for Registration of Foreign Plants producing specified products (i.e. for dairy)
- Sanitary Certificate also known as Veterinary Health Certificate
- Additional Sanitary Certificates may be required depending on the packing material:
  - Certificate of Fumigation for Wood Pallets in line with the standards if ISPM 15 (International Standard for Phytosanitary Measures No. 15)\(^{32}\)
  - Phytosanitary certificate for hay or straw if used as a packing material
- Air Waybill, Rail Waybill, or Bill of Lading
- Cargo Manifest
- Insurance Certificate
- Buyer Seller Agreement signed by both parties (not required at all ports)
- Certificate of Origin (only if requested by the importer)

The following is a list of documentation required to be prepared by importers:

- Customs Registration – for both importer and exporter registration with Customs
- Customs Import Declaration
- Automatic Import License
- Business License of Importer
- Import and Export Business License
- Certificate for Registration of Importer of Foodstuffs
- Permit to Import Live Animals and Plants Subject to Quarantine
- Commodity Inspection Certificate

For non-first-time imports the importer should also provide a copy of test report and quarantine declaration.

Samples for trade fairs and tasting – the import of samples follow the same procedures for imports however the number of samples taken for testing may be lower and the release of goods can sometimes also be completed without Chinese labels. An importer, distributor or agent should file for a certificate of exemption for labelling with the appropriate food inspection agency prior to the arrival of goods in China.

Import Requirements – Importers must have an import license prior to goods reaching customs, EU producers can either establish a Wholly Foreign Owned Enterprise to obtain an import license or work with partners who have the necessary import licenses.

\(^{32}\) China has been a signatory member of the International Plant Protection Convention since 2006
Different entry ports having different regulations and practices can therefore affect the timeframe for various formalities.

**Market Access Database: Procedures and Formalities**

Details of the required documents, including examples of these forms, and detailed information on the procedures for customs clearance are available on the Market Access Database. Both general information and specific information per product category is available via search functions using HS 4 codes.

Website: [http://madb.europa.eu/madb/indexPubli.htm](http://madb.europa.eu/madb/indexPubli.htm)

**Sanitary and Phytosanitary (SPS) requirements in China**

SPS measures may be applied in any territory or country to protect the human and animal populace as well as flora and fauna from a variety of risks such as diseases, pests, residues and toxins. SPS measures include the formation of National Standards on residues and additives, inspection procedures, and quarantine regulations. Most of the SPS measures within the PRC are in line with international standards however there are some areas where deviations do exist and exporters should be aware of potential impacts this may have.

**SPS Measures as a barrier to trade**

China as a member of the World Trade Organization (WTO) has obligations under the WTO SPS agreement to avoid the adoption or enforcement of measures that constitute arbitrary or unjust discrimination between members or act as restrictions on international trade. Despite the elimination of barriers to trade in other areas there are still some import conditions related to sanitary and phytosanitary measures for the import of agri-food products that are stricter than those required under international standards. Other concerns arise from lengthy or non-transparent application and approval procedures and measures not being aligned with international or scientific standards and these can have a negative trade impact for parties wishing to export their produce to China.

In general the processes for importing agri-food products into China are not accompanied with details of standard processing times, the only basis for gauging the time frame for these processes may therefore be previous experience of other producers.

Many products are subject to on-site visits by Chinese experts to carry out audits for each and every establishment wishing to import products to China. This system is to ensure compliance with Chinese standards on the part of European producers however this can be both time consuming and costly.

Examples of SPS measures that impact specific products or product categories include the longstanding restrictions on bovine and ovine meat imports due to bovine spongiform encephalopathy (BSE also known as “Mad Cow Disease”), milk and dairy product import procedures, and most recently measures regarding phthalate (plasticizers) levels in wines and spirits. These specific SPS related measures and their potential impact on trade for specific products or product categories are discussed in the respective sub-category chapters in this handbook.
The EU continues to work closely with the competent authorities within China on all SPS measures that are identified as being potential barriers to trade.

For the latest information on these and other issues you can visit the European Commission’s Market Access Database.

http://madb.europa.eu/madb/indexPubli.htm

Labelling Requirements
The labelling requirements for products can be one of the stumbling blocks for companies exporting to China and those wishing to enter the market should ensure that they are in full compliance with all labelling requirements to avoid issues for customs clearance procedures. Food labelling is covered by several National Standards (国标) with certain products being subject to different labelling requirements such as with alcohol in general and also with wine.

Pre-packaged foods

GB 7718-2011 general rules for labelling of pre-packaged foods national food safety standards is applicable to the almost all agri-food products imported into China and provides details on both the content and format of labels

In general following information, provided in simplified Chinese and the original language, needs to be contained on labels:

- Standard name of foodstuffs;
- List of ingredients as percentages in descending order of content, net weight and respective volume;
- Name and address of manufacturer and local agent or distributor;
- Production date, best before end date and guidance for storage;
- Country of origin;
- Quality grade;
- Code of national standard, or industrial standard, or enterprise standard for the production;
- Special contents if there are any (e.g. irradiated food).

All labels for imported foodstuff must be approved by the Chinese Inspection and Quarantine Service (CIQS) and the importer or distributor can work with customs during this process.

Article 12 of AQSIQ Decree 145, published in 2012, overseas food producers registered with CNCA have to have their registration number printed on retail packaging from the 1st of May 2012.

Non-alcoholic beverages

GB 10789-2007 the general standard for beverages categorises various beverages into categories however for labelling purposes non-alcoholic beverages utilise the provisions of GB 7718-2011.
Pre-packaged alcoholic beverages

*GB 10344-2005 general rules for pre-packaged alcoholic beverage labels,* is the applicable National Standard for alcoholic beverages in general and contains specific requirements for certain products such as wine. This standard contains guidelines on both the content and format of labels for alcoholic beverages.

In general following information, provided in simplified Chinese and the original language, needs to be contained on labels:

- Product name;
- Ingredients including any water or alcohol that was added during the production process, additives, and any plant or animal products;
- Alcohol content;
- Wort or juice content;
- Name and addresses of the manufacturer and the distributor;
- Bottling date or production date;
- Best before date or shelf life;
- Net content;
- Relevant Standard number;
- Quality grade;
- Batch number;
- Energy content and nutritional value;
- Product type; and
- Health warning.

All ingredients making up 2% or more of the product are to be listed in descending order by volume. Those ingredients that make up less than 2% of the volume do not have to be listed in descending order.

Optional information for labels includes information that can be useful for the consumer such as instructions on how to open the beverage, daily allowances, and advice on how to drink the product etc.

The provisions of *GB 7718-2011 general rules for labelling of pre-packaged foods national food safety standards* contain many of the definitions of the content to be included on alcoholic beverage labels whilst separate standards govern the use of additives and their categorisation and naming for labelling purposes. A high degree of familiarity with these and other standards is required for all exporters wishing to enter the market.

**Search for Standards**

Compulsory National Standards are available in Chinese and can be searched for via their English or Chinese title as well as their reference number on the Standardization Administration of the People’s Republic of China (SAC) official website:

http://www.sac.gov.cn/SACSearch/outlinetemplate/gjbzcx_en.jsp
General tips and best practices

Sending a small sample batch through customs before sending any major shipments of product can potentially identify labelling issues early meaning there is less chance that your product will be held at Customs for subsequent shipments.

Labelling standards are subject to change and so all parties wishing to export to China should work closely with parties experienced in import of foreign produce to ensure that labelling is done in line with the most recent regulations.

Relevant Chinese Agencies

**AQSIQ: General Administration of Quality Supervision, Inspection and Quarantine**

*Role:* Supervise the overall inspection process of imported cargo to ensure compliance with laws, regulations and administrative provisions.


**CIQ: China Inspection and Quarantine**

*Role:* As the local branch of AQSIQ the CIQ handles inspections at the points of entry for imports.


**CNCA: Certification and Accreditation Administration**

*Role:* Directly under AQSIQ responsibilities include coordinating certification and accreditation activities.


**GAC: General Administration of Customs of the People’s Republic of China**

*Role:* Customs hold all imported goods until inspection and approval, and the payment of all tariffs and taxes.

*Website:* [http://www.customs.gov.cn/publish/portal0/](http://www.customs.gov.cn/publish/portal0/)

**SAC: Standardisation Administration of the People’s Republic of China**

*Role:* to organize, coordinate and draft the programs on the development and revision of national standards.


**SAIC: State Administration for Industry & Commerce**

*Role:* Regulate the market through administrative enforcement, draft relative laws and rules, and make regulations and policies on administration of industry and commerce

2.4 The status of Geographical Indications and IP protection

High quality and well renowned products are often the targets of counterfeiting in all markets but within China a various levels of protection are available. Products with Geographical Indications benefit from the protection granted by the international legal framework, where China has been a longstanding member of international organisations and a signatory of relevant agreements and conventions and also under the national legal framework consisting of both a trademark system and a *sui generis* GI system.

The PRC has been a member of the World Intellectual Property Organisation (WIPO) from the 3rd of June 1980 and has been a signatory to the Paris Convention for the Protection of Industrial Property from the 19th of March 1985 and to the Madrid Agreement concerning the International Registration of Marks from the 4th of October 1989. On the 11th of December 2001 China acceded to the World Trade Organisation.

In 2011 the pilot EU-China Geographical Indications—“10 plus 10” project was launched with 10 EU GIs being registered within China and 10 Chinese GIs being registered within the EU as part of broader EU-China agricultural and rural development. Currently a broader bilateral agreement on GIs is being negotiated between the EU and China which would offer direct protection for European GIs in China.

At the national level there are three GI systems within China run by different ministries. These consist of a trademark registration system administered by the State Administration for Industry and Commerce (SAIC), the *sui generis* GI system run by the General Administration for Quality Supervision, Inspection and Quarantine (AQSIQ). Finally a second GI system is run by the Ministry of Agriculture (MOA), however, this applies primarily to raw agricultural products. The number of domestic GIs registered within the PRC has been on the rise with 323 products registered as GIs in 2005 to 1949 products by 2010 and there are a growing number of foreign producers who are registering their products as trademarks, GIs, or under multiple systems.

**Definitions of GIs in China**

Within Chinese legislation there are three definitions of GI provided in the trademark system and the two GI systems’ respective legislation and regulations. Whilst there are differences in the scope of coverage these are similar to definitions in international and EU legislation and regulations.

The first definition is found within Article 16 of the *Trademark Law of the PRC* which defines geographical indications as:

‘the signs that signify the place of origin of the goods in respect of which the signs are used, their specific quality, reputation or other features as mainly decided by the natural or cultural factors of the regions.’

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33 A Latin term meaning “of its own kind or class”, in this case it refers to the legislative framework established within the PRC rather than and international system.

Article 2 of the *Provisions on the Protection of Products of Geographical Indication* states that GIs:

‘refer to products that originate from a particular geographical region with the quality, reputation or other characteristics substantially attributable to the natural and human factors of the region, and denominated with the name of the region upon examination and approval.’

The final definition is for “GIs of agricultural products” found in Article 2 of the *Measures for the Administration of Geographical Indications of Agricultural Products* which states:

‘are special agricultural product indications, which are named after geographical names and are meant to tell that the indicated agricultural products are from a specific area and that the quality and major characteristics of the products mainly lie in the natural and ecological environment as well as cultural and historical factors of the area.’

Whilst these definitions are similar to their equivalents under international systems it is important to note that where discrepancies exist between the Chinese and English versions of text the Chinese text will be held to be correct.

**GI logos**
The standard forms of official logos to be used for products with GI status are outlined in the relevant legislation and regulations.

From left to right, the official logos to be displayed for GI products administered by SAIC, products registered with AQSIQ, and the logo for Agricultural GI produce registered with the MOA.

**Protection Modes**
Protection of products with geographical indications varies according to the system utilised in terms of the scope of protection offered and the options for enforcement of rights. Under the trademark system protection is available at the request of the relevant party whilst under the *sui generis* system protection of geographical indications *ex officio*[^35] is available.

**Protection under the trademark system**
Under article 16 of the Trademark Law of the PRC marks with GIs cannot be registered or used where the goods are not from the region indicated and where this would lead to the public being misled.

[^35]: A Latin term meaning “from the office”, in this case refers to government bodies carrying out protective measures as part of their mandated duties.
Article 10 also prevents the registration of foreign geographical names well known to the public except where these have been registered as collective marks or certification marks.

GI's that are registered as collective marks or certification marks are given the same level of economic and legal protection as provided for all other logos, names or marks that are registered as trademarks and allow for the exclusive use of the registered trademark.

**Collective marks:** these marks can only be used by the members of the registrants and its use as part of commercial activities indicates that the users are members of the registrants. A GI organisation is able to register for a collective mark and make this available for all members who wish to operate in the Chinese market. Examples include ‘Scotch Whisky’ which was registered by the Scotch Whisky Association as a collective mark in 2010 with use available to all members since that point.

Collective marks are intended to demonstrate that the user is a member of the mark registrants and can be considered as ‘closed marks’ in that they are not open for use by non-members.

**Certification marks:** these marks are to certify the characteristics of a product such as the origin, and the way in fact these products are manufactured and the ability to certify or supervise the production of these goods. This therefore overlaps with the Geographical Indications system allowing for GI products to be protected by certification marks.

Certification marks are intended to guarantee the special characteristics of products, these are ‘open marks’ as any party external to the registrants that can demonstrate that their products have met stipulated requirements may use the mark and registrants are forbidden from refusing the right to use.
Case Study: Champagne

As a well-known product the protection of Champagne as an appellation of origin was crucial to prevent damage to product reputation in the eyes of consumers as a result of counterfeiting or of misappropriation of intellectual property rights. In addition to protection granted under China’s trademark system Champagne also gained recognition under the AQSIQ administered system for GIs in April 2013 according to the “Provisions on protection of geographical mark products”.

These dual levels of protection have meant that protection is now available from a variety of Chinese authorities such as local bureaus of the AIC as well as the local quality and technical supervision bureau or entry-exit inspection and quarantine bureau. Administrative action and litigation in the People’s Courts has meant that Champagne and its Chinese translation of 香槟 have been protected following misuse.

Sources:
AQSIQ Announcement No.51, 2013 on Champagne Protection by Geographical Indication
http://www.cnipr.net/article_show.asp?article_id=14496

China’s trademark system follows the “first to file” principle whereby EU producers cannot seek registration where this is already legally owned by another private party. Registering trademarks early and active monitoring and opposition of other registrations may save considerable time and money compared to negotiating later with parties who own these marks or in initiating proceedings to cancel the registration.

China’s trademark system further subdivides the 42 classes of commodities and services set out in the International Classification of Goods. It is essential for companies registering trademarks to specify which of these sub-classes are required as well as the parent class. If only the parent class is registered the China Trademark Office (CTMO) will assume which sub-classes are required, which may result in errors and incomplete protection.

Lastly, due to the difference in language and script in China it is important to consider registering complementary Chinese language marks alongside the original language trademark. If no Chinese name is registered and advertised, Chinese consumers will likely make their own Chinese language moniker for the products, which may not be complimentary. Quaker Oats and the Ralph Lauren clothing brand both failed to register Chinese language marks when entering the Chinese market and are now known as ‘Old man brand’ and ‘Three legged horse’ respectively. On top of this, the adopted name, now in common usage is vulnerable to registration by third parties and can result in significant losses to brand reputation and market share as this third party is free to market and sell products under the name.
Protection under the Chinese GI systems
The protection offered by the Chinese GI systems differs according to the scope of the products that are covered as well providing complementary protection to those offered by collective and certification marks. Both of these also offer products a distinct legal status which they do not enjoy as collective or certification marks.

The definition of GIs filed with AQSIQ applies to any goods or handicrafts, but not services; GIs registered with the Ministry of Agriculture (MOA) applies for raw agricultural products and not to industrially processed products. The agricultural GI name consists solely of the geographical location followed by the general name of the agricultural product.

Disputes arising regarding registered GIs under these systems do not follow the ‘first to file’ principle utilised in trademark law.

Enforcement
When you have identified an infringement of your rights such arising from the illegitimate use of your mark different modes of administrative enforcement are available.

GIs registered as trademarks: Infringements should be reported to the local office of the Administration of Industry and Commerce (AIC). For monetary compensation to recover any financial losses parties will have to revert to negotiations or to initiating legal proceedings via the People’s Courts.

Although the legislative framework is relatively developed there are still relatively few protection precedents and less experience for courts in handling related disputes when compared with other areas of IP law. Over time with the number of registered GIs is increasing and increased experience from handling a higher case load of GI related cases courts will have a greater capacity to handle these cases efficiently.

GIs registered at the AQSIQ: Infringements should be reported to the relevant authorities who will act in an ex officio capacity. These bodies are the regional AQSIQ offices as well as regional Entry-Exit Inspection and Quarantine bureaus. Those infringing the measures of relevant provisions can face administrative fines and criminal prosecution depending on the nature of the offence.

GIs for agricultural products: The administrative department of agriculture under the people’s government at or above the county level will be the relevant authority for reporting infringements. Relevant legal provisions empower these bodies to levy administrative fines and criminal charges depending on the nature of the offence.

Notes on evidence: When reporting incidences of infringement, Chinese courts require all evidence of infringement to be notarised, i.e. witnessed by a notary public. This is the case whether merely witnessing online infringements on e-commerce platforms, carrying out sample purchases or carrying out inspections on infringers premises.
Registration

The registration processes for the three modes of protection vary in their requirements and the timeframe for successful application. These applications can be done in tandem or in isolation depending on the level of protection required.

Registration as a trademark

Article 17 of the Trademark Law allows for foreign individuals or organisations to apply for a trademark and file an application in line with agreements concluded between the PRC and the country of origin. The registration of collective or certification marks shall be done by the GI organisation at the China Trade Mark Office (CTMO) with members then applying for a Collective Mark Use Permit or a Certification Mark Use Permit with the GI organisation.

Registration requirements can be found in Articles 4-7, 10, and 11 of the Measures for Registration and Administration of Collective Marks and Certification Marks.

Registration as a GI

Under the Chinese GI system the registration process for a GI is covered under the Provisions for the Protection of Products of Geographical Indication Promulgated by the General Administration of Quality Supervision, Inspection and Quarantine of the People’s Republic of China on May 16 2005.

Article 8 specifies that GIs can only be registered by an institution, association or enterprise recognised by government rather than by an individual, whilst Article 26 allows for the application and registration of foreign GI products. There are no detailed provisions specifically for applications of foreign GIs and

Case Study: Scotch Whisky in China

In 2008 the Chinese Trade Mark Office registered ‘Scotch Whisky' as a collective trademark allowing distillers that are part of the Scotch Whisky Association to take effective action against unfair competition and counterfeiting in the Chinese market. The Chinese authorities in collaboration with the Scotch Whisky Association have investigated around 50 suspect products per year.

Scotch Whisky gained further protection when it was recognised as a GI in China in 2010. The successful registration came following three years of talks between Chinese Government officials and the Scotch Whisky Association with support from the British and Scottish Governments and the British Embassy in Beijing.

The dual levels of protection allow for consumers to be protected from fake products as well as allowing the Scotch Whisky Association and its members to protect their commercial interests in the market.

those that have been registered have been done as a result of bilateral cooperation between the EU and China or between individual EU MS and China.

If the registered GI is not utilised within a two year period then the registration can be cancelled by AQSIQ.

**Registration as a GI of an agricultural product**
The procedures for the registration of a GI under the *Measures for the Administration of Geographical Indications of Agricultural Products* the process is similar to that for applications for GIs and currently the procedures for the registration are not provided within the relevant legislation which lacks detailed provisions on the registration process. Producers are advised to contact the relevant Chinese authorities to enquire as to the latest requirements for the registration process.

**Further Points**
Successful registration of trademarks or of GIs is not guaranteed and European producers who are seeking to register GI products that are already well known or famous have reported that they have encountered increased difficulty in the registration process or been declined on their initial attempt.\(^\text{36}\)

If your GI has been registered as a trademark it is still possible to register as a GI with the AQSIQ or the MOA to gain additional and complementary levels of protection.

**Supervision and administration**
Supervision and administration of the three modes of protection is currently performed by three different bodies within the PRC. The trademarks system is administered by the State Administration of Industry and Commerce (SAIC) whilst the GI system falls under the mandate of the General Administration of Quality Supervision, Inspection and Quarantine (AQSIQ) whilst for GIs of agricultural products the Ministry of Agriculture (MOA) is the competent authority.

**Competent Authorities for GI protection**
- **Trademark Office under the State Administration of Industry and Commerce (SAIC)**
  
  Address: Sanlihedonglu No 8, Xicheng District, Beijing
  
  Postcode: 100820
  
  Tel: 86-10-8865 1802, 86-10-68027820
  

- **Department of Science and Technology under (AQSIQ)**

  Address: Madiandonglu No 9, Haidian District, Beijing
  
  Postcode: 100088
  
  Tel: 86-10-82262293
  
  Website: [http://kjs.aqsiq.gov.cn/dlbzcpbwz/](http://kjs.aqsiq.gov.cn/dlbzcpbwz/)

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\(^{36}\) Based on interviews with EU producers of products with PDO and PGI status. Conducted by the authors in June 2014
Agricultural Product Quality Safety Centre under the Ministry of Agriculture (AQSC)
Address: Xueyuannanlu No 59, Haidian District, Beijing
Postcode: 100081
Tel: 86-10-62191443
Website: http://www.aqsc.gov.cn/
Additional Resources

**IP PROTECTION FOR THE FOOD AND BEVERAGE INDUSTRY IN A NUTSHELL**

The food and beverage (F&B) industry encompasses the formulation, processing, production, distribution in wholesale or retail, and delivery of food products. Recent research shows that an increasing number of European F&B SMEs are making significant investments in emerging East Asian markets, particularly China, with new local product development and national business strategies. While this continues, changes are occurring in the industry that is redefining how companies grow, operate, and manage risk. Intellectual property rights (IPR) are a key component of these developments, thus increasing the need to protect those rights in several countries.

When it comes to Chinese Laws and Regulations, the F&B industry is a highly regulated sector. Foreign companies need to apply for a food production license to ensure that they meet the requirements for manufacturing capabilities and environmental regulations. Foreign products need to conform to specific standards and protocols depending on the type of products. Chinese labels need to be applied to the products to complete the Customs clearance and enter the country. In addition, a separate food and beverage distribution license is required to sell in China.

These mandatory legal requirements for production or importing in China do not directly involve intellectual property rights, however protecting IP has the same importance as complying with other laws and regulations - without officially registered IP rights in China, IP is not protected. Chinese companies have taken advantage of the fact that many F&B producers do not have these rights, resulting in a market rife with counterfeit and infringing products. Products which include Geographical Indications (GIs) within the product name are also a target for counterfeiting and IP infringing activities. In light of this, producers for products registered and protected under European quality schemes such as PDO or PGI have made use of the various modes of protection available in China. Food and beverage products, including those with GIs, can be protected under trademark laws as well as China’s GI system and a suitable level of protection should be sought at the earliest opportunity.

**Trade marks for F&B**

Concerns about product quality and safety in China and the high number of counterfeit or fake goods in the market bring Chinese consumers to heavily rely on trusted brands to determine their purchases. A trustworthy brand and good business reputation are critical to success in the F&B market in China.

China uses the ‘first-to-file’ system, meaning that legal protection cannot be gained if a similar mark has already been registered within China. It is therefore essential to register trade marks before entering. It is also recommended that companies file a separate registration for a Chinese trade mark, keeping in mind the message that is intended to be conveyed by the brand instead of just translating word-for-word.

The Chinese Trademark Law also allows registration of 3-D marks as trademarks. It may be the shape of
product or its container or packaging; however, they must be distinctive from common shapes or packaging. Although there are various forms of protection for shapes under copyright or design patents, the rights granted by trade mark registration are very strong as they can be renewed an indefinite number of times.

**Trade marks for Geographical Indications**

Geographical Indications refer to the name or sign used on certain products which corresponds to a specific geographical location or origin. GIs can also signify that the product possesses certain qualities, is produced according to traditional methods or acquires an international reputation. Due to this, high quality and well renowned products of GIs are often the targets of counterfeiting in all markets. GIs are as valuable as trademarks to producers and should be protected correspondingly, in this way products with GIs benefit from the protection granted by the international legal framework, of which China is a member.

Under China’s trademark law GIs cannot be registered or used where the goods are not from the region indicated and where this would lead to buyers being misled. The registration of foreign geographical names well known to the public except where these have been registered as collective marks or certification marks, is also prohibited.

GIs that are registered as collective marks or certification marks are given the same level of economic and legal protection as provided for all other logos, names or marks that are registered as trademarks and allow for the exclusive use of the registered trademark. The registration of collective or certification marks shall be done by the GI organisation at the China Trade Mark Office (CTMO) with members then applying for a Collective Mark Use Permit or a Certification Mark Use Permit with the GI organisation.

**Chinese GI systems**
The protection offered by the Chinese GI systems differs according to the scope of the products that are covered as well providing complementary protection to those offered by collective and certification marks. Both of these also offer products a distinct legal status which they do not enjoy as collective or certification marks.

There are two GI systems within China run by different ministries with the *sui generis* (unique in its characteristics) GI system run by the General Administration for Quality Supervision, Inspection and Quarantine (AQSIQ) and a second GI system run by the Ministry of Agriculture (MOA) however this applies primarily to raw agricultural products.

The definition of GIs filed with AQSIQ applies to any goods or handicrafts, but not services; GIs registered with the Ministry of Agriculture (MOA) applies for raw agricultural products and not to industrially processed products. The agricultural GI name consists solely of the geographical location followed by the general name of the agricultural product.

Please note that disputes arising regarding registered GIs under these systems do not follow the ‘first to file’ principle utilised in trademark law.
Reputation is the key

The food and beverage sector is moving fast in China now, as consumers look for new trustworthy brands. This presents huge opportunities for foreign businesses, particularly in the wake of recent Chinese food safety scandals. However, it should not be underestimated how important brands and packaging are to the success of companies operating in the F&B industry. Mandatory requirements for product and label registrations are very different things from IP registration, and failure to address the latter can result in a completely failed venture. For food and beverages, reputation is almost everything, and reputation is kept safe through registered intellectual property.

Successful registration of trademarks or of GIs is not guaranteed and European producers who are seeking to register GI products that are already well known or famous have reported that they have encountered increased difficulty in the registration process or been declined on their initial attempt. If your GI has been registered as a trademark it is still possible to register as a GI with the AQSIQ or the MOA to gain additional and complementary levels of protection.

Free advice on IPR Protection and Enforcement for European SMEs
The China IPR SME Helpdesk supports European Union (EU) small and medium sized enterprises (SMEs) to both protect and enforce their Intellectual Property Rights (IPR) in or relating to China, through the provision of free information and services. These take the form of jargon-free, first-line, confidential advice on intellectual property and related issues, plus training, materials and online resources.

Click here to submit an enquiry and receive an expert reply within three working days, free of charge.

China IPR SME Helpdesk – Guide to Geographic Indications in China

China IPR SME Helpdesk – IPR Protection for the Food and Beverage Industry
Legislation, Regulations and Administrative Measures

The Trademark Law of the People’s Republic of China 2001
Available in English at: http://www.saic.gov.cn/sbjEnglish/flfg1_1/flfg/201012/t20101227_103092.html

Regulations for the Implementation of Trademark Law 2002
Available in English at: http://www.saic.gov.cn/sbjEnglish/flfg1_1/flfg/201012/t20101227_103090.html

Provisions for the Protection of Products of Geographical Indication 2005

Measures for the Administration of Special Signs of Geographical Indication Products 2005

Measures for the Administration of Geographical Indications of Agricultural Products 2008

Administrative Measures for the Well-known Agricultural Product 2007

3.0 Market Snapshots for Selected Products

This section provides specific information for various food and beverage categories and products. This information includes a market snapshot containing analysis of the market size, trends, distribution, and consumer profiles and sensitivities. Additional information regarding market entry, import procedures, and considerations for intellectual property are also included.

Product Categorisation

Within the following category specific market snapshots products have been aggregated and analysed according to the Harmonised System (HS) codes. For some product categories a single HS 4 entry will be covered whilst for others there will be multiple HS 4 categories across different HS 2 chapters. See below for specific HS 4 codes covered in the following product category sections.

<table>
<thead>
<tr>
<th>Product Category</th>
<th>HS 2 chapters or HS 4 codes</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wine and Vermouth</td>
<td>2204, and 2205</td>
<td>Wine and aromatised wines</td>
</tr>
<tr>
<td>Spirits</td>
<td>2208</td>
<td>Spirits of an alcoholic strength of less than 80%</td>
</tr>
<tr>
<td>Beer</td>
<td>2203</td>
<td>Beer made from malt</td>
</tr>
<tr>
<td>Fresh and Processed Meat</td>
<td>0201, 0202, 0203, 0204, 0206, 0207, 0210, 1601, and 1602</td>
<td>Fresh meat covers the meat and edible offal of beef, pork, lamb, and poultry; processed meat covers edible meat or offal that has been salted is in brine or is dried or smoked, sausages and similar products of offal and meat and other prepared or preserved meat or offal</td>
</tr>
<tr>
<td>Olive Oil</td>
<td>1509 and 1510</td>
<td>Olive oil and its fractions, and other oils produced from olives</td>
</tr>
<tr>
<td>Fresh fruit and Vegetables</td>
<td>07, and 08</td>
<td>All products under these chapter headings</td>
</tr>
<tr>
<td>Processed Fruit and Vegetables</td>
<td>20</td>
<td>All products under these chapter headings</td>
</tr>
<tr>
<td>Dairy Products</td>
<td>0401, 0402, 0403, 0404, 0405, and 0406</td>
<td>Includes milk and cream not concentrated or sweetened, milk and cream concentrated or sweetened, buttermilk and yoghurt, whey and natural milk products, butter, and cheese and curd</td>
</tr>
<tr>
<td>Processed Cereals</td>
<td>1902 and 1904</td>
<td>Pasta and couscous, and breakfast cereals and cereal bars.</td>
</tr>
<tr>
<td>Bread, Pastry, Cakes, Biscuits and other Bakers' Wares</td>
<td>1905</td>
<td>Products include bread, biscuits, wafers, cakes and pastries</td>
</tr>
<tr>
<td>Confectionary</td>
<td>1704 and 1806</td>
<td>Sugar confectionary including white chocolate, and chocolate and other foods containing cocoa</td>
</tr>
<tr>
<td>Honey</td>
<td>0409</td>
<td>Natural honey</td>
</tr>
<tr>
<td>Live Plants</td>
<td>06</td>
<td>Includes bulbs, live plants, cut flowers and ornamental foliage.</td>
</tr>
</tbody>
</table>
3.1 Wine and Vermouth

Market Snapshot

Wine and Vermouth are important EU exports to China both in terms of volume and value of sales and quality. Wines with PDO and PGI status had enjoyed positive year on year growth in sales over the last decade with more varieties from more producing countries entering the market. Despite positive projections for long term growth, issues of saturation, regulatory changes, and changes in the market have meant intensifying competition and short term declines in imports in 2014 and into 2015.

Whilst the size and projected growth of the market are attractive prospects for GI wine producers, changing consumer perceptions and motivations pose challenges for branding, distribution channels and marketing.

Market size and market share

More than 80% of wines consumed in China are made domestically; this, combined with rising imports it has made China the largest single market for wine.

Imports of wine, including PDO and PGI wine, were valued at EUR 600 million in 2010 rising to EUR 1.03 billion in 2011 then peaking in value in 2012 at EUR 1.23 billion before contracting in value to EUR 1.14 billion in 2014. The value of imported Vermouth started from a more modest base of EUR 0.5 million in 2011 but showed consistent growth reaching EUR 2.69 million in 2014.

European Union exports of wine to China peaked during 2012 with a total value of EUR 766 million before contracting to a value of EUR 648 million in 2014. In 2012 the EU accounted for 65.2% of China’s imported wine and 15.6% of the overall market. In 2014 the EU still held a dominant position in the Chinese market, but its share of imported wine had decreased to 57%.

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37 In Search of riches, France to ply China with wine http://www.cnbc.com/id/101521820
38 ITC Trade Map
39 Eurostat
40 China Drops European Wine Dumping Inquiry http://www.wine-searcher.com/m/2014/03/china-drops-european-wine-dumping-inquiry
41 ITC trade Map
France has maintained its dominant position in the market for sales of wines, although its market share has decreased over the period 2011 to 2014, from 73% to 68% respectively, reflecting an overall decline in value of sales during this period. Chinese imports of PDO Bordeaux wine from France followed a similar trend, decreasing in sales value over the period 2011 to 2014, although volumes remain substantial. Spain, Italy, and Germany all made gains for market share, as they each managed to post moderate overall positive growth in value. Exports that include PDO Rioja and PGI Veneto wine from Rioja, Spain and Veneto, Italy for example both saw a 29% rise between 2011 and 2014. Chinese consumers are developing an increasingly sophisticated palate, and are willing to try wines from different countries. This is being facilitated by moving beyond the notion that wine is better if the price is higher; now, many consumers are better able to assess the quality of wine from taste, rather than just price, which opens up more opportunities for PDO and PGI wines to enter the market.

Although larger trade partners have seen contractions of the market or slowing growth rates, other EU MS have managed to buck the trend and have seen positive year on year growth. Hungarian wine exports, which include PDO Tokaj wine, to China have grown in value by 64% between 2011 and 2014.

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42 Eurostat
43 Eurostat
Red wine currently holds the lion’s share of the imported wine market in China in terms of volume, with sparkling wine accounting for only 0.5% of volume sales in 2011. Sparkling wines have seen positive growth in terms of value of trade and have made gains in market share between 2011 and 2014. The value of EU exports of sparkling wine to China grew from EUR 21 million in 2011 to EUR 34 million in 2014, with market share of EU exports increasing from 3% to 5.3%. For example, EU-28 total export to China of sparkling wine of fresh grapes, including PDO and PGI sparkling wines (excluding Asti Spumante and Champagne) has witnessed substantial growth over the period 2011-2014, increasing from EUR 2.8 million to EUR 8.1 million. Much of the growth in this segment was driven by Italy, which exported some EUR 4 million to China in 2014, and Spain, which exported EUR 2.3 million. Similarly, the value of EU-28 total export to China of sparkling wine of fresh grapes, including grapes that contribute to PDO and PGI wines, increased from some EUR 75,000 in 2011 to some EUR 565,000 in 2014. The lions’ share of the growth for this product came from Italy, which exported some EUR 460,000 to China in 2014.

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46 Eurostat
47 Eurostat
48 Eurostat
49 Eurostat
50 Eurostat
It is important to note that despite the size of the Chinese market as a whole the market for wines should not be overestimated with a 2010 study estimating that only 14.3 million adults between 18 and 50 bought imported wines regularly out of the 23 million adults who could afford to do so,\textsuperscript{51} this relatively small number of regular drinkers therefore means that the national average for consumption was just 1.5 litres per capita in 2013 – far below European levels.\textsuperscript{52} Another estimate of the current market size places the number at 19 million upper middle class consumers who have developed a taste and a growing interest for wine.\textsuperscript{53}

**Growth drivers and trends**

Economic slowdown in China and issues of excess inventory led to a lower growth in volume for 2012\textsuperscript{54} only to recover through the first three quarters of 2013 to then see a sharp decline in response to austerity measures at the end of 2013 and through the first half of 2014. Following these ups and downs in the market, industry opinion is at times divided as to the trajectory of the market in coming years.

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\textsuperscript{51} China not a “one billion” market \url{http://www.cnwinenews.com/html/201005/21/20100521121049.htm}

\textsuperscript{52} China Is Now World’s Biggest Consumer of Red Wine \url{http://blogs.wsj.com/scene/2014/01/29/china-is-now-worlds-biggest-consumer-of-red-wine/}

\textsuperscript{53} Italian wine producers join hands to hit Chinese market \url{http://www.neurope.eu/article/italian-wine-producers-join-hands-hit-chinese-market}

\textsuperscript{54} Chinese Wine Market: "Tempting But Risky" \url{http://www.wine-searcher.com/m/2013/04/chinese-wine-market-tempting-but-risky}
Since the introduction of austerity measures in 2013, many affluent consumers and high-end hotels and restaurants have scaled back their spending on expensive imported products during banquets, and gifting has been on the decline. This had a significant impact on the trade of high-value wines in the first quarter of 2014 with imports in Shanghai declining in value by 27% \(^{55}\) although alcoholic drinks volume growth remained robust. \(^{56}\) Unlike the high-value end of the market, where slower growth rates are predicted, the middle and lower tiers of the market are set to grow in the coming years as wine becomes more accessible for a wider range of consumers. \(^{57}\) PDO and PGI wines should benefit from this broader uptrend, as the Chinese palate becomes more sophisticated and they gain a greater understanding of wine, paving the way for wines which have built reputations around food pairing such as PDO Gavi along with heavier PDO and PGI Merlots and Cabernet Sauvignons etc.

Future growth may be slower and subject to further downturns, although industry experts see this as a maturing of the overall market with consolidation and a greater focus on quality. \(^{58}\) More consumers will also come of drinking age in China, combined with increasing awareness of wines and wine culture, a diversification of consumption trends should create more opportunities for GI wine exporters.

It is expected that the Chilean market share of wine exports to China will increase due to the free trade agreement signed with China in 2012 \(^{59}\). Since it came into force, importing tariffs have been gradually reduced and, by 2015, there will be no tariffs to Chilean wines, improving the competitiveness of Chilean wines on the Chinese market.

**Geography and major markets**

Wine producing regions in China such as Ningxia, Liaoning, and Shandong are producing wines of greater quality, and, while domestic products enjoy a healthy market share, there are still niches and opportunities for imported wine in these areas driven by consumer desires for trading up.

Although demand for imported wines will still exist in these regions, there will be greater competition from domestic brands who are better placed to make use of distribution networks and will be competitively priced compared to imported wine.

The traditional markets for wine consumption have been the developed tier 1 cities such as Beijing, Shanghai and other large cities in China’s developed coastal provinces. These cities accounted for 80% of


\(^{58}\) Chinese Wine Market "No Longer Crazy" [http://www.wine-searcher.com/m/2014/05/chinese-wine-market-no-longer-crazy](http://www.wine-searcher.com/m/2014/05/chinese-wine-market-no-longer-crazy)

total consumption in 2013. Distribution and retail channels are at their most developed in these markets, although increasing pressure on retailers and issues of market saturation are making these markets more competitive.

Development in tier 2 and 3 cities is increasing the consumer base and creating new markets for wine distributors. However, brand awareness and consumer knowledge will be lower than in tier 1 cities. Domestic brands will pose stiff competition with competitively priced options in these markets, marketing and building brand awareness will be important for differentiating EU produce from other imported wines and domestic brands.

Distribution
The biggest importing ports/regions of wines in China are: Shanghai, Shandong, Hebei, Guangdong and Tianjin, with their imports corresponded approximately to 78 percent of the total imported wine in 2012. In 2013 private enterprises accounted for 57.1% of total wine imports by volume, wholly foreign-owned enterprises (WOFE) accounted for 19.6% of imports by volume, whilst state owned enterprises accounted for 14% of import volume. A report by the China Food and Drinks Fair finds that large numbers of importers are dropping out of the market with even larger numbers joining the market, pointing to a growing but turbulent market. It is also important to note that for promotion and sales the onus is often on exporters rather than on importers and distributors.

Research shows that distribution channels differ for imported and domestic brands, for imported wines 20% of sales were via retail channels, and 80% of sales were via restaurants, hotels and bars, whilst for local wine 54% of sales were via retail. Major supermarkets have steadily increased their wine selection, from several domestic brands, to a wide variety of wines from around the world, and will likely increase their market share for imported wine sales in the future as Chinese consumers discover more and more regions in both the new and old world wine countries. As various retail outlets stock a greater selection of imported wines, GI products should also benefit, particularly as Chinese consumers develop a greater appreciation for, and understanding of, wine.

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61 EU SME Centre Sub-sector report: Wine market in China 2011
62 China bottled wine imports increased by 26.5% http://www.winechina.com/html/2013/07/201307176414.html
63 China bottled wine imports increased by 26.5% http://www.winechina.com/html/2013/07/201307176414.html
67 Italian wine producers join hands to hit Chinese market http://www.neurope.eu/article/italian-wine-producers-join-hands-hit-chinese-market
Research on the venues where wine consumers were drinking more than once a month found that 88% did so at restaurants, 60% drank in a bistro or café, 55% drank in a pub or a wine bar, and 55% did so at someone’s home.\footnote{Ehrenberg-Bass Institute ‘China Wine Barometer’, March 2013, n=916, Chinese aged 18 – 50 upper middle class drinkers of imported wine in Beijing, Shanghai, Guangzhou, Chengdu, Shenyang, Wuhan \url{http://www.gwrdc.com.au/wp-content/uploads/2013/07/Inseries-workshops_China-Insights_Final.pdf}} Off trade distribution can also lend itself to efforts to promote the upper range of wines, and thereby meet affluent consumers’ desires for purchasing high quality wines.

Online retailers will continue to increase their influence as a major sales channel, with more than 20 million consumers looking for wine information online and 16 million consumers making online purchases.\footnote{How Serious Is China About Fighting Fake Wine Sales Online? \url{http://www.winechina.com/html/2015/02/201502271955.html}} Some of these act as online platforms for brick and mortar establishments, whilst two of the largest wine retailers, Yesmywine.com and Tmall, are solely online retailers. Digital marketing to complement online sales has also taken off in China, with many brands already present on social networks such as Weibo and Wechat.\footnote{Spanish wine market in China is developing \url{http://marketingtochina.com/spanish-wine-market-china-developing/}}

**Consumer profiles**

For Chinese consumers, wine is still a relatively new product and, whilst it may be viewed as a staple in many countries, in China it is still a luxury product,\footnote{GAIN report Marketing Wine in China \url{http://gain.fas.usda.gov/Recentpercent20GAINpercent20Publications/Marketingpercent20U.S.percent20Winepercent20inpercent20China_Shanghaipercent20ATO_Chinapercent20Peoplespercent20Republicpercent20of_4-19-2012.pdf}} and wine is consumed occasionally. Affluent Chinese born in the 1970s or ‘80s are the main consumers for wines at the higher end of the market where conspicuous consumption of well-known brands that come with high prices acts as a status symbol or a mark of taste. However, it is important to note that these consumers may have limited knowledge of wines.

A second type of consumer is a savvier wine drinker, reflective of the burgeoning middle class and professionals based in more developed cities such as Beijing, Shanghai and Guangzhou. These consumers often have increased awareness of wines and wine culture having gained exposure through western dining, travel, and promotional events staged in these large commercial hubs.

An increasing number of Chinese are studying or working abroad and many will gain a knowledge of, and appreciation for, the wines of their host country and its neighbours. This subgroup will be more selective in their purchases of wines at the high end of the market and may purchase mid-market wines more frequently.\footnote{EU SME Centre Sub-sector report: Wine market in China 2011}
Female consumers are an important market for wine exporters, as 22% of female urban consumers drank wine,73 as spirits and beer are not traditionally marketed to female consumers.

**Colour Associations**
Chinese consumers’ preference for red wine over white or rosé has been attributed to the colour as much as to any other factor influencing consumer perception and taste.74 The positive associations of the colour red has meant that red wine has managed to become a common site at special events and festivals such as weddings and Chinese New Year celebrations, where red is the traditional colour for decorations, clothing, and gift packaging.

**Toasting and wine etiquette**
Wine is often consumed as part of group gatherings for holidays or for business dinners and drinking etiquette differs from that of Europe. Small amounts of alcohol will be poured and consumed in one go as part of a toast rather than continual sipping. Whilst wine education events are popular for some consumers, current toasting etiquette will likely prevail for the foreseeable future for the majority of occasions where wine is consumed.

**Pairing and Chinese cuisine**
Whilst having a full bodied red wine with spicy food rather than a sweet white may not be seen in Europe, in China different palates make these combinations more attractive, where tannins that enhance the spicy flavour are favoured over wines that would diminish the sensation.75 White wine is growing in popularity in certain regions with a large amount of seafood, especially in the South East of China. Regional preferences can therefore alter the way in which wines are paired and marketing strategies should examine these differences at a regional and city by city basis.

For formal occasions where wine is gifted and consumed, considerations of pairing with dishes is not as important as giving face to the recipient, meaning that the brand reputation and price will be the most important factors behind the purchase.76

**Gifting and Austerity**
Branding has shifted away from themes of luxury and is now trying to align more with themes of success or lifestyle. Whilst consumers still see imported wine in a positive light they may be more hesitant to purchase expensive brands for gifting purposes and have shifted to mid-priced or domestic alternatives creating opportunities for many wine producers.

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73 “Alcohol consumption in 0.5 million people from 10 diverse regions of China: prevalence, patterns and socio-demographic and health-related correlates” International Journal of Epidemiology 2013;42:816–827
74 China becomes biggest market for red wine, with 1.86bn bottles sold in 2013 http://www.theguardian.com/world/2014/jan/29/china-appetite-red-wine-market-boom
Market Access and Entry

Wines do not face any market access restrictions and market access is available for all exporters who have completed the Registration of Foreign Exporters of Foodstuffs and are able to comply with the requirements of Chinese import procedures and relevant standards.

Customs procedures

Documentation required for import into China includes:

- Commercial Invoice
- Packing List
- Certificate for Registration of Foreign Exporters of Foodstuffs
- Air Waybill, Rail Waybill, or Bill of Lading
- Cargo Manifest
- Insurance Certificate
- Certificate of Analysis
- Buyer Seller Agreement signed by both parties (not required at all ports)
- Certificate of Origin (only if requested by the importer)

The following is a list of documentation required to be prepared by importers:

- Customs Registration – for both importer and exporter registration with Customs
- Customs Import Declaration
- Automatic import License
- Business License of Importer
- Import and Export Business License
- Certificate for Registration of Importer of Foodstuffs
- Commodity Inspection Certificate (if this is not the first shipment)

The certificate of analysis should state the content of sulphur dioxide and sulphites in order to comply with Chinese standards which set maximum levels for these substances.

SPS measures

Sanitary and Phytosanitary measures governing the import of wines are mostly in line with international standards however since 2013 testing for phthalates (plasticizers) is required for wines and spirits and the maximum levels set within Chinese standards are lower than those in international standards. Although this has not had a major impact on wine imports, producers and exporters should monitor the implementation of this administrative measure for any potential effect this will have upon imports.

You can track the status of this measure and the EU response on the EU Market Access Database:
Labelling
Wine is subject to labelling requirements under Chinese national standards and incorrectly labelled products will not be able to enter the Chinese market. As per the requirements of GB 15037-2006 all labels for wines must include information such as:

- Volume;
- Alcohol content;
- Country of origin and wine region;
- Variety of wine;
- Grape variety;
- Vintage year;
- Production or bottling date;
- Shelf life;
- Storage instructions;
- List of ingredients including raw ingredients and additives;
- National standard code;
- Production license;
- Warning;
- Address and contact information of the importer.

Requirements can vary depending upon the point of entry and national standards are subject to change, exporters should work closely with importers with relevant expertise prior to making shipments to ensure that the most recent standards are complied with.

Intellectual Property Rights
Wines enjoy an increased level of protection as granted in accordance with the TRIPs agreement and under Chinese legislation it is forbidden to use another party’s GI for wines and spirits as a trademark where the product in question does not originate from the area indicated in the GI. Furthermore use is prohibited even where the trademark is accompanied by terms such as “like” “type” or “style”.77

Infringement of intellectual property and the misappropriation of brands and counterfeiting is still an issue in the market. High demand for high quality imported wines and low consumer awareness can act as an incentive for counterfeiters, particularly in lower tiered cities where consumer awareness and exposure to wines is lower than in tier 1 cities. Industry experts can point to the sheer amount of wines sold in China, in some cases outstripping production,78 as evidence of the scale of the problem.

Ensuring effective protection of intellectual property rights and timely cooperation with Chinese authorities can help to tackle counterfeiting whilst measures such as bottle buy back and increasing consumer awareness can also aid in prevention of intellectual property infringement.

77 Measures for the Regulation and Administration of Collective Marks and Certification Marks, Article 12
78 European Chief courts Chinese cooperation on counterfeiting http://www.wine-searcher.com/m/2012/06/european-chief-courts-chinese-cooperation-on-counterfeiting
Combatting counterfeiting of wines on e-commerce platforms requires market surveillance on the part of producers to notify platforms of unlicensed vendors or counterfeit produce who can then take down the site. The Chinese government and e-commerce platforms both view this issue seriously and this has spurred on recent initiatives to tackle this issue.  

Case study

Background

A Chinese company from Shandong province successfully registered the geographical indication of a famous European wine in China. Before registration, Chinese wine consumers already knew the European geographical indication. After registration, the Chinese company started producing, importing and selling wine with the GI as brand. This made the Chinese consumers think this was the wine originating from the authentic European region.

Action taken

The Administrative for Industry and Commerce demanded the Chinese company to stop selling products with this GI on the packages and to stop using the GI as trade mark in accordance with article 16 of the Trademark Law. Moreover, all the labelled goods in storage were confiscated. The relevant European wine organisation for that geographical indication filed a registration with the China Trademark Office to protect the GI as collective mark. This collective mark was later granted.

Lesson learnt

Protection for GIs is improving in China, especially for GIs of foreign countries. Therefore, if you have plans to enter the Chinese market, or have already entered the Chinese market, urging your GI organisation to register the geographical indication as a collective or as a certification mark should have first priority. It would save the GI producer much more efforts in promotion, advertising, as well as fighting against infringement if the GI can be registered for protection in China as soon as possible.

79 How Serious Is China About Fighting Fake Wine Sales Online?
http://www.winechina.com/html/2015/02/201502271955.html
3.2 Spirits

Market Snapshot

The market for spirits in China had been a highly attractive one for foreign producers, including GI producers, having posted significant year on year growth, especially for high price point premium products. The market is now, however, showing signs of slower long term growth rates as well as shifting away from premium spirits. Major players in the industry are diversifying their portfolio by introducing new product ranges to a more varied consumer base as part of a restructuring and maturing of the market.

Whilst the market may continue to fluctuate over coming years, opportunities may be presenting themselves for new products as Chinese consumers become more sophisticated in their consumption and tastes. Competition is still fierce, however, industry experts have commented that the current climate allows for brand positioning and nurturing of the long term development of the market.80

Market size and market share

China is the largest consumer of spirits in the world with consumption in 2012 equating to approximately 40% of global spirits consumption by volume.81 Domestic producers still dominate the market with sales of the Chinese spirit of choice baijiu (白酒). Baijiu dominates the market in terms of both value and volume sales and maintains approximately 98% of the market share,82 with products ranging from low to ultra-high price points.

The value of imported spirits in China has seen fluctuations with trade rising from EUR 529 million in 2010 to a peak of EUR 954 million in 2012 only to contract in value to EUR 688 million in 2014. The EU is the main exporter of spirits to China; however the share of the market has been decreased from 74% in 2011 to 49% in 2014.83 The majority of this export value was generated by France and the UK which accounted for 94% of the EU’s spirits export value in 2014.84 Other important exporting countries include the USA, Korea, Japan, and Russia however their respective market shares still trail behind EU exports in terms of value.
China is a key market for many spirits producers and companies, sales of cognac in China accounted for 40% of Rémy Cointreau’s total profits, also accounting for 15% of Pernod Ricard SA’s earnings. Recent years have also seen products other than cognac and whisky are making gains in both export value and increased market share for spirits exports from the EU. These products are starting from more modest bases but their positive growth during a challenging period for the industry bodes well for their future performance in the market.

Source: Eurostat and ITC Trade Map
Growth drivers and trends

The growth prospects for the spirits market are mixed as poor performance of premium products points to future declines in value, whilst changing consumer preferences point to robust growth for a variety of mid-priced products.

Research has indicated that volumes of spirits consumption will continue to rise however at slower rates than in previous years. These growth rates of spirits consumption have been predicted to be at around 8.69% CAGR up until 2017, lower than the 0.21% year on year enjoyed in the period between 2006 and 2011.

The high end segment of the market will likely continue to see reduced rates of growth and possibly further contractions due to the continued austerity measures being implemented in China. Corporate entertainment and gifting had accounted for around 70% of profits generated for baijiu, however, in the wake of austerity measures research has found that 42% of companies have scaled back their expenditure as a direct result of these measures. High net worth individuals have also scaled back their

86 For Liquor Makers, Cheer Dries Up in China http://www.wsj.com/articles/SB10001424052702303947904579335882886931114
87 Study Links CCP’s Crackdown To Business Banquet Spending Slump http://jingdaily.com/study-links-ccps-crackdown-to-business-banquet-spending-slump/
personal expenditure on luxury items such as premium imported alcohol, studies have indicated that expenditure on gifting by these consumers fell by 25%.

Indications are that volume sales for spirits may remain buoyant but that patterns of entertainment are changing to less-expensive local spirits. This means that value growth may decrease; however, industry figures believe this to be a normalisation of the market rather than reflecting negatively upon the prospects for long term growth.

Increasing per capita consumption is driving growth faster than rising incomes or demographic factors. Chinese consumers are also increasingly willing to experiment with new products meaning that drinks with lower present market shares may continue to see increased growth driven by more adventurous consumers.

Imports of French GI Cognac, for example, experienced a rise of around 50% between 2010 and 2012, followed by a decline of approximately the same value between 2012 and 2014, largely attributable to the anti-corruption drive implemented by China’s new government in the last quarter of 2013 (which curtailed the buying of luxury goods including expensive bottles of GI Cognac that were once popular gift items) and due to China’s steadily slowing economy.

Similarly, while exports of Scotch Whisky, including GI Scotch Whisky, to China rose by around 40% between 2010 and 2013 – due to rising demand for Western spirits by a broadening Chinese middle class and ‘gifting’ by Chinese government officials – these figures declined between 2013 and 2014; most probably due to the corruption drive that the Chinese government implemented in the last quarter of 2013 and the first quarter of 2014.

Like many European spirits, Polish Vodka including GI Polish Vodka exports to China fluctuated over the period 2011-2014; from EUR 154,122 (millions) to EUR 366,855 (million) between 2011 and 2012, and back to around EUR 170,016 (million) by 2014. These figures are less dramatic than those observed for Scotch Whisky. This is likely because sales of GI Polish vodka were lower than sales of GI Scotch Whisky before the corruption drive was implemented and ‘gifting’ of luxury products was largely eradicated; thus its effects were less dramatic. While gifting has declined (resulting in lower sales of expensive whisky for status purposes), tastes for Western spirits like vodka have grown more popular among young middle-to-high-income Chinese consumers who are increasingly likely to drink it socially.

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88 Hurun Best of the Best – Chinese Luxury Consumer Survey 2014  
http://www.hurun.net/EN/ArticleShow.aspx?nid=262
89 For Liquor Makers, Cheer Dries Up in China  
http://www.wsj.com/articles/SB10001424052702303947904579358882886931114
90 IPSOS Report: Drinking to the Future Trends in the Spirits Industry  
91 China Business Review  
http://www.chinabusinessreview.com/opportunities-in-chinas-alcoholic-beverage-market/
92 Eurostat
93 Eurostat
94 Eurostat
Ouzo exports including GI Ouzo to China from Greece have fluctuated in recent years. For example, Ouzo exports along with GI Ouzo declined markedly between 2010 and 2011 (by almost 80%), rising significantly — by over 100% — by 2012, before declining marginally once again in 2013. As above, market interference by the Chinese government in 2013 might explain the latter trend. While figures in 2013 did not decline to 2011 levels, they remained low in comparison to other European spirits; this is likely because Ouzo is not a widely known or consumed beverage in China.

**Geography and major markets**

The major markets for imported spirits continue to be tier 1 cities where there is a developed consumer base and established distribution networks. Competition in these cities will be high however building brand awareness and sales in other markets can be challenging for new entrants to the market.

Spirits consumption shows regional variation in terms of consumption with consumption most prevalent in the provinces of Sichuan, Henan, Hunan, and Gansu. For imported spirits regions within the North and North East regions’ trade links and proximity to the Russian Federation will translate to greater awareness of vodka, whilst in the South consumers show greater preference for grape and fruit based spirits and drinks.

**Distribution**

Retail channels traditionally have held a dominant position in the distribution chain due to the status of imported spirits as a luxury good and the reliance of on trade establishments on trusted establishments for the distribution of products within local markets. For high end products some distributors offer direct sales to consumers on VIP client lists and whilst this may have high profit margins for sales the consumer base will be restricted to high net worth individuals.

Specialist alcohol and tobacco shops within larger urban centres are increasingly offering limited selections of imported spirits. Supermarkets and hypermarkets do not usually dedicate significant store space for imported spirits but could increase their market share if the industry shifts towards mid-price-point products targeting middle class and affluent consumers. Lifestyle and boutique retailers for food and beverages can stock selections of mid to high-end spirits that may not be available via other retail channels. These stores can help build brand awareness and act as an entry point for new brands however the consumer base and volume of sales will be limited.

High-end hotels and restaurants had traditionally stocked selections of imported spirits to cater for large banquets. Due to the restructuring of the sector in response to austerity measures this channel may experience slower growth and loss of market share for sales.

Online retail is a growing sector within China, and although there may be challenges for the regulation of B2B platforms, its growth potential should not be ignored for those wishing to reach more tech savvy consumers and expand their geographical coverage.

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95 Eurostat
96 “Alcohol consumption in 0.5 million people from 10 diverse regions of China: prevalence, patterns and socio-demographic and health-related correlates” International Journal of Epidemiology 2013;42:816–827
97 GAIN Report China Spirits Market apps.fas.usda.gov/gainfiles/200708/146291935.doc
**Consumer profiles**

The traditional target market for imported spirits had been middle aged to senior male businessmen who would consume spirits as part of banquets. Spirits with high price tags and easily recognisable brands would be gifted and consumed to give face to both the recipient and the giver in order to improve interpersonal and professional relationships. Whilst this demographic is still important it is no longer driving growth due to the effects of austerity and the clampdown on gifting.

Of urban male drinkers 32% consume strong spirits, consumption being more prevalent for middle aged and senior consumers rather than for younger males. The average drinker of spirits in China will have low brand awareness for imported spirits and mainstream consumption is not currently the norm. Purchases of imported spirits for gifting purposes may be done in line with Chinese festivals and the packaging, price, and brand reputation will be important factors in purchase decision making.

Younger consumers who purchase spirits in bars, clubs, and karaoke clubs are an important demographic for low to mid-price-point spirits. These consumers will also seek out recognised brands however they will not purchase premium or super-premium offerings as consumption in these social settings are less formal and focus less on giving face than in a business context. Domestic producers have also increasingly targeted younger consumers with new product offerings and brand positioning.

Female consumers, although not a significant segment of the baijiu market, are acting as a growth driver for imported spirits. Although women have not played a significant role in the market for baijiu, due to its connotations of being a male drink, imported spirits are seen to be more socially acceptable and consumption by young professional women has risen in recent years. Consumption may differ in that spirit consumption is less likely to be done with straight spirits but rather as mixed drinks or as cocktails. Financially independent female consumers could become a significant consumer group of imported spirits as current marketing and brand positioning of domestic produce does not target these consumers.

**Austerity and Gifting**

The sales of spirits have suffered as a result of austerity measures and anti-corruption initiatives and marketing strategy has had to adapt to the new climate. High price point products that were traditionally targeting business men and more mature consumers have shifted marketing concepts such as luxury towards success or have changed their target consumer. Gifting is certainly not dead however in the current climate products in the mid-price point range will be more suitable as gifts if they can be positioned as being high quality without appearing extravagant.

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98 “Alcohol consumption in 0.5 million people from 10 diverse regions of China: prevalence, patterns and socio-demographic and health-related correlates” International Journal of Epidemiology 2013;42:816–827
Market Access and Entry
Spirits do not face any market access restrictions and market access is available for all exporters who have completed the Registration of Foreign Exporters of Foodstuffs and are able to comply with the requirements of Chinese import procedures and relevant standards.

Customs, SPS requirements, and Labelling
The customs procedures for the import of spirits are relatively straightforward and effective collaboration with importers and Chinese authorities can ensure the timely clearance of goods for the market.

Customs procedures
Documentation required for import into China includes:

- Commercial Invoice
- Packing List
- Certificate for Registration of Foreign Exporters of Foodstuffs
- Air Waybill, Rail Waybill, or Bill of Lading
- Cargo Manifest
- Insurance Certificate
- Certificate of Analysis
- Buyer Seller Agreement signed by both parties (not required at all ports)
- Certificate of Origin (only if requested by the importer)

The following is a list of documentation required to be prepared by importers:

- Customs Registration – for both importer and exporter registration with Customs
- Customs Import Declaration
- Automatic import License
- Business License of Importer
- Import and Export Business License
- Certificate for Registration of Importer of Foodstuffs
- Commodity Inspection Certificate (if this is not the first shipment)

In line with obligations under the Convention on the International Trade of Endangered Species of Wild Fauna and Flora certain spirits that contain plants of endangered species face additional import requirements.

These products are required to be accompanied by a Permit to Import Endangered Species and Products Thereof. Applications should be submitted to the State Forestry Administration of the People’s Republic of China.

SPS measures
Sanitary and Phytosanitary measures governing the import of wines are mostly in line with international standards however since 2013 testing for phthalates (plasticizers) is required for wines and spirits and
the maximum levels set within Chinese standards are lower than those in international standards. Although this has not had a major impact on spirits imports batch-by-batch testing is still required and low levels of phthalates have to be met, producers and exporters should monitor the implementation of this administrative measure for any potential effect this will have upon imports.


**Labelling**

Spirits are subject to labelling requirements under Chinese national standards and incorrectly labelled product will not be able to enter the Chinese market. As per the requirements of GB 15037-2006 all labels for Spirits must include information such as:

- Volume
- Alcohol content
- Country of origin
- Type of alcohol
- Production or bottling date
- Storage instructions
- List of ingredients including raw ingredients and additives
- National standard code
- Production license
- Warning
- Address and contact information of the importer

Alcoholic beverages with an alcoholic content of over 10% are not required to provide shelf life information.

Requirements can vary depending upon the point of entry and national standards are subject to change, exporters should work closely with importers with relevant expertise prior to making shipments to ensure that the most recent standards are complied with.

**Intellectual Property Rights**

As Spirits are a high value commodity, and consumer awareness of how to spot low grade or fake products can be low, counterfeit products can pose an issue for brand owners. Registering all trademarks including logos bottle designs and labels is a must. Careful monitoring of your supply chain, market surveillance, and cooperation with the relevant Chinese authorities can minimise the risk of infringement of intellectual property and allow for timely measures to be taken if this does occur.
As spirits are increasingly purchased from online retailers an effective strategy for cooperating with e-retail platforms to deal with counterfeit produce will only increase in importance. Larger e-retail platforms are increasingly active in their efforts to prevent IP abuse;\textsuperscript{102} however where consumer awareness remains low and potential profit margins high, there remains a financial incentive for counterfeit produce via a distribution channel where enforcement procedures are still in their infancy.

For traditional retail channels IP enforcement strategies can also include additional measures such as bottle buy back schemes or introducing design features for bottles or labels that make it easier to identify counterfeit produce. Collaboration with the relevant Chinese authorities for the enforcement of rights and training on how to spot a fake can also contribute towards efforts to combat infringement. Perhaps the most important tactic however is improving consumer awareness of possible infringements and the value attached to genuine products, thus encouraging consumers to educate themselves in the identification of fakes and avoidance of infringing products. This approach has worked particularly well in the European wine trade where knowledge of the products is now a socially respected asset and consumers take a proactive role in the selection of respected products.

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**Case Study: Johnnie Walker**

As a brand which has a long presence in the Chinese market, enjoys a 27% market share for imported whiskies, and has registered trademarks, Johnnie Walker enjoys the status as a “well-known brand” in China.

In early 2007 two Chinese companies based in Jiangsu started to use trademarks registered by Johnnie Walker by utilising similar logos for their olive oil based skin care products. Following litigation the Shanghai intermediate court found that the two companies were infringing upon a well-known trade mark made to pay damages and to cease infringing activities.

As the infringing trademarks were not identical but were similar to those registered by Johnnie Walker the court’s decision was made in reference to article 13.2 of the Trademark Law and Article 2.1 of the Interpretation of the Supreme People’s Court on a Few Issues in the Application of Laws for the Trial of Civil Disputes over Well-Known Mark Protection (Interpretation).

**Sources:**

Johnnie Walker’s Successful Suppression of Trademark Dilution  


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**Take Away Tips:**

- Market surveillance should not just focus on your sector; well recognised trademarks can be misappropriated for a wide range of products.

- Registering logos and other trademarks that are similar to those used by your brand can help to prevent their use by other parties.
3.3 Beer

Market Snapshot

Beer has been present in China with large-scale, albeit localised, production for over a hundred years. Domestic producers of German style light lagers have increased their market penetration at the national level, with foreign beers in the market for premium and artisanal products. Beer consumption is relatively widespread, although drinking habits and consumer sensitivities are different from those in Europe. Whilst the industry has seen solid year on year growth, domestic domination of the low-price-point market and consolidation of the market mean that the successful positioning of new brands will focus on capitalising on growing niche markets, rather than mainstream consumption.

Market size and market share

The beer industry is characterised by large volume but low-value for domestic macro brewers, with production accounting for 71% of the beer market by volume, but accounting for a modest 16% of the profits in the Asia-Pacific region in 2010. Profit margins are lower for beer than other types of alcohol, particularly spirits, as there is less opportunity for marking-up the prices. Consumers are willing to pay high prices for the cache associated with high-end spirits, where margins are considerably higher, but many consumers do not attach the same status to beer. In 2013 consumption of beer accounted for an 84% share of overall alcoholic drinks in total volume terms, however average returns of domestic macro brewers are relatively low at around CNY 100 (approximately EUR 16) per ton.

Production had enjoyed ten years of consecutive growth, with production in 2013 reaching 51 billion litres, marking an increase of 4.6% from levels in 2012. In 2014, however, annual beer production dropped to 49 billion litres, marking a decline of 0.94%. Revenues of domestic producers increased 86% between 2006 and 2012, and are predicted to continue growing 10% per year until 2018.

A few of Germany’s PGI Bayerisches Bier producers have a number of breweries across China. Some are located, for example, in Kempinski hotels, another German brand. Under the licensing conditions, these PGI Bayerisches Bier breweries dictates that all the brewing kit used is sourced from Germany, rather than using Chinese models.

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103 Heineken Chases Higher China Profit With Premium Beer Focus
104 China’s Beer Market: Where “Premium” Doesn’t Always Mean Premium
105 GAIN Report U.S. Craft Beer Has a Great Potential in the China Market
   http://www.fas.usda.gov/data/china-us-craft-beer-has-great-potential-china-market
106 Beer in China: ISIC 1553 2013
107 An Export Article Made in Munich
   http://www.paulaner.com/en/international/paulaner-brauhauser
PGI Budějovické pivo from the Czech Republic is also popular in China. However, taste preferences in China are different from those in Europe; a producer of PGI Budějovické pivo reports that dark lager constitutes a far larger percentage of sales in China than in Europe\textsuperscript{109}. This could be because local consumers that choose to purchase Czech lager do so because they prefer the taste of dark lager, rather than purchasing a lighter lager that is more readily available from local producers or other countries.

Total beer imports, including PGI beer, into China grew in value year on year from 2011 to 2014 from EUR 64 million to EUR 304 million,\textsuperscript{110} whilst the value of imports from the EU has shown strong year on year growth having increased from EUR 46 million in 2011 to EUR 268 million in 2014.\textsuperscript{111} This equates to an average year on year growth of EU beer exports to China of 79.8%, and a growth in market share of imports from 71% in 2011 to 88% in 2014.

Over half of this trade is in beer in containers under 10 litres (excluding bottles) followed by bottled beer and then beer in containers of over 10 litres, however the value of bottled beer has outpaced other categories.

\textsuperscript{109} Budejovický Budvar brewery triples exports to China \url{http://ceskапozice.lidovky.cz/budejovicky-budvar-brewery-triples-exports-to-china-pcv/-tema.aspx?c=A101217_183149_pozice_1778}

\textsuperscript{110} ITC Trade Map

\textsuperscript{111} Eurostat
The main exporting countries are Germany, the Netherlands, Belgium, and the United Kingdom. Germany maintains a strong position in the market, but its market share declined from 70% in 2011 to 44% in 2014. German imports maintained a dominant position in the domestic beer market, and was for a long time the primary source of imported product. However, other countries are increasingly entering this growing market, impacting Germany’s share.

Source: Eurostat
Growth drivers and trends
Rising disposable income and an increased focus on healthier lifestyles may lead to declines in the volume of beer consumption as consumers with high socioeconomic status are more likely than others to consume less frequently or in lower amounts. However, rising income is associated with the desire to trade up and so a growing number of middle class and affluent consumers have the potential to drive increased sales of premium products, even if net volume sales decline.

There are a number of craft beer breweries within the larger urban markets, Beijing and Shanghai, which may be able to further increase consumer exposure to a larger variety of beers and therefore help increase demand for premium imported beers. Increased numbers of Chinese studying, working and travelling can also diffuse knowledge of European beer in their home country, and build brand awareness that can be leveraged in the Chinese market.

Source: Eurostat

"Alcohol consumption in 0.5 million people from 10 diverse regions of China: prevalence, patterns and socio-demographic and health-related correlates" International Journal of Epidemiology 2013;42:816–827
Geography and major markets
There are only a few localities in China where beer drinking can be considered common, namely Harbin and Qingdao. This can be attributed to the longer exposure to beer consumption as the location of the first modern brewers in China established in 1900 and 1903 respectively.

Large urban centres that are established markets are the main markets for imported beer and are showing increasing consumer sophistication. Lower tiered cities are seen by macro breweries as future growth markets however there is strong competition from low price domestic brands. Brand positioning as a premium beer may allow for future niche markets in tier 2 and 3 cities however this may require extensive marketing as brand awareness is currently low.

Distribution
Independent small grocers are the dominant retail channel for alcoholic drinks in China by volume, although consumers’ increased willingness to try out new options and novelties negatively impacted sales performance. Supermarkets continue to build market share. Internet retailers are increasingly popular among young consumers due to their convenience and competitive prices.

Consumer profiles
The typical consumer of beer in China is a young or middle aged male urban resident, with 30% of male urban residents drinking beer. 34% of male drinkers consuming on at least a weekly basis were aged 30–39 years, compared with just 8% of those aged 70–79 years.

Consumers of craft beers tend to be Chinese who have worked, studied, or travelled abroad and gained exposure to similar beers in Europe or America. Other consumers are young professionals who make their first purchase out of curiosity and can become occasional consumers.

Where people drink
The majority of beer consumption is done at restaurants with meals. Other venues where beer is consumed include bars and clubs, karaoke clubs, cafes and at home. Western style bars have the widest selection of imported beer available. Although these Western style bars may have initially catered to expat communities, they are becoming increasingly popular with younger drinkers who have adopted more Western styles of consumption with occasional heavy episodic drinking.

Beer varieties and consumer preference
Domestic beers are German style light lagers, while exposure to different varieties such as wheat beers, pale ales, ales, bitters, stouts, and porters etc. is limited.

113 “Alcohol consumption in 0.5 million people from 10 diverse regions of China: prevalence, patterns and socio-demographic and health-related correlates” International Journal of Epidemiology 2013;42:816–827
115 Alcohol consumption in 0.5 million people from 10 diverse regions of China: prevalence, patterns and socio-demographic and health-related correlates International Journal of Epidemiology 2013;42:816–827
117 Alcohol consumption in 0.5 million people from 10 diverse regions of China: prevalence, patterns and socio-demographic and health-related correlates International Journal of Epidemiology 2013;42:816–827
Artisanal beers and craft beers are gaining popularity in some of the larger cities in China with a small but growing number of craft breweries producing their own craft beers. Examples such as Jing A Great Leap Brewing, Slow Boat Brewery, Boxing Cat Brewery in Beijing and Shanghai cater to the expat community, but are also helping to widen the appeal of more beer varieties to Chinese consumers.

**Toasting**

Beer consumption, in line with alcohol consumption in general, is generally done through regular toasting with small glasses being drained in one go throughout the course of a social event. Whilst this mode of consumption can fit in with domestic light lagers with an alcohol content of around 3%, for heavier beers continual toasting over a prolonged period would be more challenging. Without any substantive change in drinking culture in China, the predominance of light lagers, or at least beers with relatively low alcohol content, will remain the established drink for mainstream consumption.

**Market Access and Entry**

Beer does not face any market access restrictions, and market access is available for all Exporters who have completed the Registration of Foreign Exporters of Foodstuffs and are able to comply with the requirements of Chinese import procedures and relevant standards.

**Customs procedures**

Documentation required for import into China includes:

- Commercial Invoice;
- Packing List;
- Certificate for Registration of Foreign Exporters of Foodstuffs;
- Air Waybill, Rail Waybill, or Bill of Landing;
- Cargo Manifest;
- Insurance Certificate;
- Certificate of Analysis;
- Buyer Seller Agreement signed by both parties (not required at all ports);
- Certificate of Origin (only if requested by the importer).

The following is a list of documentation required to be prepared by importers:

- Customs Registration – for both importer and exporter registration with Customs;
- Customs Import Declaration;
- Automatic import License;
- Business License of Importer;
- Import and Export Business License;
- Certificate for Registration of Importer of Foodstuffs;
Commodity Inspection Certificate (if this is not the first shipment).

**Labelling**
Labelling for beer is governed by the provisions of GB 10344-2005 general rules for pre-packaged alcoholic beverage labels, the information required for beers includes:

- Product name;
- Ingredients including any water or alcohol that was added during the production process, additives, and any plant or animal products;
- Alcohol content;
- Wort content;
- Name and addresses of the manufacturer and the distributor;
- Bottling date or production date;
- Best before date or shelf life;
- Net content;
- Relevant Standard number;
- Quality grade;
- Batch number;
- Energy content and nutritional value;
- Product type; and
- Health warning.

All ingredients making up 2% or more of the product are to be listed in descending order by volume. Those ingredients that make up less than 2% of the volume do not have to be listed in descending order.

Optional information for labels includes information that can be useful for the consumer such as instructions on how to open the beverage, daily allowances, and advice on how to drink the product etc.

The provisions of **GB 7718-2011 general rules for labelling of pre-packaged foods national food safety standards** contain many of the definitions of the content to be included on labels for beers whilst separate standards govern the use of additives and their categorisation and naming for labelling purposes. A high degree of familiarity with these and other standards is required for all exporters wishing to enter the market.

**Intellectual Property Rights**
It is necessary to have a suitable level of protection for intellectual property rights (IPR) to ensure that any misuse of your brand or misleading or counterfeit goods can be dealt with effectively. There have been instances of Chinese producers misappropriating the trademarks of European beers within the Chinese market. In one instance locally produced beer was being sold as “Carlsberg” the vendor was found to be in breach of Article 52 of the Trademark Law of the PRC and was fined CNY 20,000 through the People’s Courts.\(^\text{118}\)

\(^\text{118}\)韩某销售侵犯“嘉士伯”注册商标专用权案 [http://www.375tm.com/hangyejiaodian/20996.html](http://www.375tm.com/hangyejiaodian/20996.html)
In another instance a company utilised the protected trademark “Heineken” in their business name and their logo also consisted of a green background with a five pointed red star, the local Administration of Industry in Commerce (AIC) in Yueyang ordered the Chinese company to cease infringing activities and issued a notification preventing the use of “Heineken” as part of a business name to prevent the public being misled.\(^{119}\)

Keep in mind that intellectual property rights are territorial, meaning that it is necessary to register your trade mark and other IP in China in order to be protected. Furthermore, China’s ‘first to file’ system can leave new market entrants with little recourse if their trademarks are registered by third parties before they make their own applications. Best practice is to register early and be proactive in enforcing IP rights, protecting brand identity from potential damage resulting from infringement.

\(^{119}\) “A beer company infringes trademark rights” 外地一家啤酒公司涉嫌商标侵权
http://shangbiao.lawtime.cn/sbnews/2008101132709.html
3.4 Fresh and Processed Meat

Market Snapshot
The Chinese market for fresh and processed meat is large and has significant growth potential making it an attractive market for trading partners such as the United States, Australia, and New Zealand. Increasing consumer demand for both fresh and processed meat products as well as changing consumer preferences away from the traditional staple of pork towards other meats means that opportunities will increase for a wide range of companies and GI producers.

Imports, including fresh and processed GI meat, have not only shown an increase in volume but have also begun transitioning to higher value products shifting from items like chicken feet and animal offal to muscle meat. Pork still performs strongly however imports of beef, poultry, and mutton have also risen.

Constraints do still exist in the market, especially for improving consumer confidence on the safety of various produce, and in improving distribution channels which are fragmented and lack sufficient cold chain storage. There are also market access restrictions for meat products, including PDO and PGI meat products, into China which have limited the growth of EU exports. As these restrictions are eased at a bilateral level between individual Member States and China the market is becoming more open for imported produce, especially high-quality GI produce.

Market size and market share
There is a large and growing market for imported fresh meat with the value of total imports growing from EUR 1.06 billion in 2010 to EUR 3.27 billion in 2014 (excluding products under HS code 0206).\(^{120}\) The major trend has been of increasing value across beef, pork, mutton, and poultry.

\(^{120}\) ITC Trade Map
Major trading partners with China include the USA, Australia, New Zealand and the EU with each of these trading partners or blocs enjoying dominance in market shares for different fresh meat products.

Exports of fresh meat from the EU have grown by 106% in value from 2011 to 2014 with pork being the main product for export holding a 94.5% share of export value in 2014, poultry held a 5% value share, with limited trade of beef and mutton.

Edible offal of bovine animals, sheep, swine etc. have grown from EUR 927 million in 2010 to EUR 1.1 billion in 2014. The EU is the largest source of imported offal in China, enjoying a 50% market share of
import value in 2014.\textsuperscript{121} The USA is the other main exporter of offal to China; exports in 2014 were valued at EUR 396 million accounting for a 36\% share of the market in value terms.

\begin{figure}
\centering
\includegraphics[width=\textwidth]{China_imports_offal.png}
\caption{China's imports of edible offal of bovine animals, swine, sheep, goats etc fresh chilled or frozen (in millions of Euros)}
\end{figure}

Processed meat imports were of a more modest value EUR 6.2 million in 2010 growing to EUR 6.7 million in 2014.\textsuperscript{122} Despite the lower value of trade for these products the EU enjoyed a dominant market share ranging between 46\% (in 2012) to 81\% (in 2014).\textsuperscript{123} PGI Jamón de Serón from Spain, for example, had a slight decrease in export value of 6\% between 2012 and 2013.\textsuperscript{124}
Growth drivers and trends

One of the major dietary changes in China in recent decades has been the shift away from grains and staple foods towards increased meat consumption, following rising living standards and disposable income.\textsuperscript{125} Per capita consumption of beef and poultry shows a steady increase in line with income growth, which also correlates with increased meat consumption away from home for beef, pork, and poultry in higher income groups.\textsuperscript{126} As China continues to develop and incomes rise, the market for fresh and processed meat will benefit significantly.

Lifestyle changes are also increasing demand for processed meat products within China. Consumers seeking more convenient lifestyles are increasingly purchasing processed meat products as alternatives to traditional dishes that may be more time consuming to prepare.\textsuperscript{127} Consumers are also trading up in their purchases of processed meat with the chilled processed food gaining popularity compared to sterilised meat products due to the nutritional value and taste. This trade up is especially evident in tier 1 and 2 cities.\textsuperscript{128} As consumers continue to seek to trade up in terms of quality and taste, this trend should continue to bolster sales of chilled processed meats.

\begin{itemize}
\item \textsuperscript{125} China’s Growing Appetite for Meats: Implications for World Meat Trade
  \url{http://www.informaecon.com/MCSChinaMeat2012.asp}
\item \textsuperscript{126} GAIN Report Meat demand in urban Chinese households
\item \textsuperscript{127} Processed meat market to hit $800 billion in five years
  \url{http://www.themeatsite.com/meatnews/22701/processed-meat-market-to-hit-800-billion-in-five-years/}
\item \textsuperscript{128} Euromonitor Chilled processed food in China
  \url{http://www.euromonitor.com/chilled-processed-food-in-china/report}
\end{itemize}
Within the Chinese market retail sales in the chilled food category increased by 10% in 2012, with chilled processed meats registering 10.8% growth, from RMB79.7 billion (EUR 9.74 billion) in 2011 to RMB 87.8 billion (EUR 10.7 billion) in 2012. The market share of products has also indicates a continued shift in consumption away from traditional Chinese processed chilled meats, such as Chinese sausages, towards Western-style products, such as ham and bacon. From 2007 to 2012, the combined market share of chilled ham and bacon increased from 29% to 32.2%, while traditional Chinese sausages fell from 34% market share to 31.5%. Should these trends continue European processed meats will be in a good position to increase export values as consumers seek to trade up in their processed meat purchases.

A diversification of the processed meat industry followed the skyrocketing of pork prices in 2007 as meat producers and companies sought to cover their losses and mitigate against further price fluctuations. Poultry was the main alternative however beef and mutton have also benefited from the diversification of the market.

The macroeconomic development trends in China will continue to make imported meat and meat products more competitive in the future. The increase in prices for domestic meat and meat products is driven by constraints on agriculture such as rising costs of inputs, availability of farmland, and increased cost of regulatory compliance. Retail prices for beef and mutton rose 85% between 2009 and 2013, whilst prices for pork and poultry rose by approximately 30% in the same period. Statistics on mainland China’s pork trade reveal a strong positive correlation between import volumes and domestic pork prices. China is increasingly moving away from self-sufficiency in fresh meat opening the market for exporters of a variety of products.

**Geography and major markets**

As consumers in more developed urban areas have greater access to refrigeration allowing for better storage and consumption options they will be more likely to purchase chilled or frozen meats and thereby relying less on wet markets. More developed tier 1 and 2 cities where supermarket and hypermarket chains are well established and have invested in their logistics and cold chain infrastructure are the largest markets for imported meat products.

The Southwest and West of China due to large populations of Muslim ethnic minorities consume more poultry, beef and lamb products. The market place for imported cured meat products is still a niche one

132 China’s volatile pork industry [http://www.ers.usda.gov/media/262067/ldpm21101_1_.pdf](http://www.ers.usda.gov/media/262067/ldpm21101_1_.pdf)
and limited to tier 1 cities where specialist stores and upscale supermarkets cater to expatriate communities and affluent Chinese consumers. East and North Eastern China with their higher number of white collar workers with lifestyle aspirations are the most receptive markets for products such as deli meats.

**Distribution**

There has been relatively little investment in a national cold chain network due to China’s vast geography, fragmented transportation networks, and regionalised markets. In 2009, the meat cold chain only covered some 10% of the country. Larger retail chains will have more developed cold chain infrastructure in place however their geographical coverage may be limited to a single city limiting the ability to gain wider market penetration.

Main points of entry for fresh and processed meat, by trade volume and value, are concentrated in Eastern and North Eastern China:

- The majority of fresh meat imports enter the market from Shanghai, Guangzhou, and Tianjin;
- Edible offal has its main entry points as Tianjin, Dalian, Guangzhou, Shanghai, and Nanjing;
- Meat and edible offal smoked cured or in brine enters via Guangzhou, Nanjing, and Tianjin;
- Sausages enter primarily via Gongbei, Shanghai, and Shenzhen; and
- Other prepared meat products enter via Shanghai, Shenzhen, and Xiamen.

For fresh meat traditional wet markets have been the main channel for sales of pork with these markets built near major residential areas. Within 10km of a residential area the probability of finding such a wet market is 90% and 82% of pork is sold via these markets with the meat sold warm and fresh. These markets under greater scrutiny from Chinese authorities and in the event of animal health issues authorities will utilize the hazards analysis and critical control points (HACCP) often resulting in the suspension of trade of meat products from these venues.

The main distribution route for chilled processed meat products are tier 1 cities with supermarkets the main retail channel with a 70% share and convenience stores with a 15% market share. Supermarkets are also the primary retail channel for chilled or frozen meats as they can offer a wider range of produce than convenience stores and are seen to be more convenient than hypermarkets for consumers.

Restaurants, fast food chains, and cafeterias play a key role in diversifying meat consumption since many feature specific kinds of meat or chicken. In particular, beef and mutton are important parts of

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137 China’s demand for processed meat continues to rise [http://www.wattagnet.com/China%E2%80%99s_demand_for_processed_meat_continues_to_rise.html](http://www.wattagnet.com/China%E2%80%99s_demand_for_processed_meat_continues_to_rise.html)

popular hot pot, kebabs, and other types of ethnic cuisine that are becoming popular among the broader population.\textsuperscript{139}

**Consumer profiles**
Middle aged and senior consumers are less likely to eat away from home and often still perceive the consumption of meat to be a luxury.\textsuperscript{140} As such older consumers will make fewer purchases from restaurants and bistros, whereas younger consumers, especially who have had exposure to Western fast food chains, are more comfortable with frequent consumption of meat away from home. This generational divide also applies to the consumption of meats with older consumers less likely to make purchases of meats such as beef or mutton unless for dietary or cultural reasons.

**Halal products**
Chinese Muslims and residents in South-eastern China are the main consumers of poultry meat rather than pork and domestic companies are also actively targeting these consumers with processed chicken, beef and lamb products.\textsuperscript{141} Chinese Muslims are primarily in China’s Western, South Western and North Western provinces and demand for halal products in these areas will increase if these needs cannot be met from halal butchers within these communities.

**Meat cut preference**
Chinese consumers have a strong preference for offal and cuts deemed less desirable in the West with dishes such as chicken feet, duck necks, and beef tripe being delicacies for some cuisines. As such, China continues to be a profitable market for cuts of meat which have a lower value in the EU internal market.\textsuperscript{142} Many of the dishes will be regional specialities such as beef tripe being used in Mongolian, Beijing, or Sichuan style hotpot, and steamed chicken feet being a popular dish in Guangdong dim sum. Market research as to what cuts are used where can identify lucrative niche markets for cuts that may otherwise have negligible profit margins.

**Consumer concerns over food safety**
Despite the increasing interest in processed meat, consumers still view such products with caution.\textsuperscript{143} Purchasing decisions are based primarily on concerns of quality,\textsuperscript{144} especially in the wake of recent health scandals such as the dumping of deceased swine in the Huangpu river, and the sale of expired

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\textsuperscript{140} Exporting meat products to China – Opportunities for EU exporters [http://www.dccchina.org/2015/03/exporting-meat-products-to-china-opportunities-for-eu-exporters/]

\textsuperscript{141} China’s demand for processed meat continues to rise [http://www.wattagnet.com/China%E2%80%99s_demand_for_processed_meat_continues_to_rise.html]

\textsuperscript{142} EU Maintains Share of Chinese Pork Imports [http://www.themeatsite.com/meatnews/26761/eu-maintains-share-of-chinese-pork-imports/]

\textsuperscript{143} China’s demand for processed meat continues to rise [http://www.wattagnet.com/China%E2%80%99s_demand_for_processed_meat_continues_to_rise.html]

\textsuperscript{144} Processed meat – what is the new Euromonitor data telling us? [http://www.globalmeatnews.com/Analysis/Processed-meat-what-is-the-new-Euromonitor-data-telling-us]
meat in fast food restaurant chains. Brand reputation must therefore be built upon a solid safety record and marketing must assure consumers of the high standards required of European produce in order to allay their concerns and build trust in the safety of imported meat and meat products.
Market Access and Entry

Meat products are subject to market access restrictions and require bilateral protocols to be in place between the country of origin and China, a veterinary health certificate for animal products as well as registration of production units with CNCA.

Article 7 of the food safety law of the PRC requires the establishment of a bilateral protocol between the PRC and the country of origin. Market access for meat and meat products is not currently available for all EU MS due to a lack of a bilateral protocol and/or a lack of a health or sanitary certificate.

Current Status of Bilateral Protocols for meat export to China:

Green dots represent protocols and certificates being in place, red dots represent on-going negotiations.

Source:
https://www.google.com/maps/d/viewer?mid=zYUm2FDKky.kDKLKhqxBn&msa=0&hl=en&ie=UTF8&t=m&z=4&vpsrc=1%3E

Exporter establishment registration process

According to Article 65 of the Food Safety Law of the PRC establishment registration of EU exporters of meat and meat products with CNCA, is mandatory and only those who have completed the registration
procedure and been listed on the CNCA website are able to export their products to China. The import of meat or meat products from non-listed establishments is prohibited and produce will not be able to enter the Chinese market.

The registration process is supervised by the CNCA and requires the exporting country to provide corresponding technical documentation to CNCA within the “Questionnaire-assessment and investigation on veterinary public health system concerning the registration for the foreign establishments intended to export meat to China” (hereinafter the questionnaire)

This questionnaire is available online:  http://www.cnca.gov.cn/cnca/extra/xzzq/00033.pdf

Exporters are also required to complete the application template in order to make a formal written application to their local authorities. (hereinafter the application)

This template is available online:  http://www.cnca.gov.cn/cnca/extra/xzzq/00032.pdf

The questionnaire (left) and application form (right) required for the registration of exporting meat establishments.

The applications for registration filed by the responsible governmental authority where the Overseas Food Enterprise is located must be provide the following documents:

- The laws and regulations of the home country regarding epidemics involving animals and plants, veterinary health, public health, plant protection, and monitoring of the residue of pesticides and drugs given to animals; written materials documenting the structure of the authority
responsible for such laws and regulations, as well as the staff; and those responsible for enforcement of local laws and regulations;

- A list of Overseas Food Enterprises for the registration application;
- A report issued by the responsible governmental authority of the home country on the actual situation of quarantine and public health involving the Overseas Food Enterprise;
- A statement issued by the responsible governmental authority of the home country on compliance with China’s laws and regulations governing Overseas Food Enterprises; and
- Application documents prepared by the Overseas Food Enterprise, including floor plans of factories and warehouses, and refrigerated warehouses and techniques.

In addition, Overseas Food Enterprises must meet the following conditions, and certain certificates must be submitted at the same time as well:

- The home country’s veterinary service system, plant protection system, and public health administration system pass evaluation by CNCA;
- Raw materials used for food imported into China must come from areas where there are no epidemics;
- Overseas Food Enterprises must be established with all required approvals and currently be under the supervision of responsible authorities of the home country; and
- Sanitation conditions of Overseas Food Enterprises must comply with the relevant laws and regulations of China.

Exporter establishment evaluation and approval process
Upon the submission of an application CNCA authorities will evaluate the technical material sent by the local authority in the country of origin and will decide if an on-site visit is necessary. Should a visit be deemed necessary CNCA will then send a team to conduct on-site visits and inspections. The local authorities and the establishments being examined are required to provide logistical support and to bear the costs of these on site evaluations.

Experts from the CNCA will evaluate the field reports of the inspection team and will then make the decision regarding the approval of audited facilities. When an establishment is approved it is granted a unique registration number that will be valid for four years and allow for exports to China.

Should a previously listed establishment wish to start exporting a new product that falls under a different category, this establishment will be subject to new inspections by CNCA.

Approved European exporters for meat products:
Available at: [http://www.cnca.gov.cn/ywzl/gjgnhz/jkzl/](http://www.cnca.gov.cn/ywzl/gjgnhz/jkzl/)

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</tr>
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Finland has two establishments recently inspected and approved

**Customs procedures**

Documentation required for import into China includes:

- Commercial Invoice
- Packing List
- Certificate for Registration of Foreign Exporters of Foodstuffs
- Air Waybill, Rail Waybill, or Bill of Lading
- Cargo Manifest
- Insurance Certificate
- Certificate of Analysis
- Buyer Seller Agreement signed by both parties (not required at all ports)
- Certificate of Origin (only if requested by the importer)
- Veterinary Health Certificate for Animal Products

The following is a list of documentation required to be prepared by importers:

- Customs Registration – for both importer and exporter registration with Customs
- Customs Import Declaration
- Automatic Import License
- Business License of Importer
- Import and Export Business License
- Certificate for Registration of Importer of Foodstuffs
- Commodity Inspection Certificate (if this is not the first shipment)
- Permit to import live animals and plants subject to quarantine

In line with obligations under CITES certain meat products that of endangered species face additional import requirements. Products such as those derived from wild bovine, wild boar, wild suckling pigs and other animal products covered under HS category 0208 will require a Permit to Import Endangered Species and Products Thereof. This permit should be obtained by the importer from the State Forestry Administration of China.
SPS measures

Bovine and ovine products originating in the EU had faced a longstanding ban due to concerns over Transmissible Spongiform Encephalopathy (TSE). At the end of 2013 imports of live animals witnessed a limited opening and since the beginning of 2014 there have been increased efforts to process applications in order to further open the market for ovine and bovine products.

The European Commission continues to work with the relevant Chinese authorities and updates are available on the European Commission’s website:

- Transmissible Spongiform Encephalopathy: long standing bovine and ovine product restrictions
- African Swine Fever: non recognition of zoning measures

Since the 13th of February 2014 restrictions on the import of pork have been in place due to concerns of African Swine Fever (ASF). Despite zoning measures being taken by the veterinary authorities within Poland, trade has been suspended.

Intellectual Property Rights

The mislabelling of meat products regarding the country of origin can be a risk in the market in an attempt to sell produce at higher prices so as to capitalise on the reputation for quality for imported produce. As consumer awareness of individual brands remains low the risk of misappropriation of product specific IP is relatively low compared to other categories of food and beverage products.

Producers must still ensure that their produce has a suitable level of protection and that there is sufficient cooperation with the relevant authorities for enforcement within China. The loss of sales and consumer confidence as a result of a food scandal, even where this involves counterfeit produce, has the potential to set back market entry in the mid to long term as rebuilding consumer trust can prove difficult.

As the market for imported meat is set to grow, the risks to IP are likely set to rise necessitating the early registration and active enforcement of IPR wherever possible.
3.5 Olive Oil

Market Snapshot
Olive oil had witnessed a decade of explosive year on year growth in the Chinese market; however, in recent years this has slowed. New potential markets and consumers within the country give optimism for future prospects of the industry, although at slower rates than previously witnessed. Increased consumption driven by consumers seeking healthy edible oil products healthier choices is expected to outpace domestic production, resulting in higher imports.

Market size and market share
Olive oil makes up approximately 1% of the edible oil consumed in China.\textsuperscript{145} The value of total imports of olive oil in 2013 stood at EUR 138 million\textsuperscript{146}, with imports from the EU valued at EUR 113 million,\textsuperscript{147} accounting for an 81% share.

Imports from the EU increased in value by a significant 28% from 2011 to 2012, in line with a decade of rapid growth in the market. However, 2013 and 2014 have witnessed declines in the value of exports, with the value of trade in 2013 declining 15% compared to 2012 values and marked by a further 10.5% contraction from 2013 to 2014, returning trade to just under its value in 2011.\textsuperscript{148} These declines may however reflect declines in production for 2012 and 2013 which has been credited for a global decline in import levels.\textsuperscript{149}

\textsuperscript{145} Chinese acquire a taste for olive oil \url{http://usa.chinadaily.com.cn/business/2014-03/05/content_17325409_2.htm}
\textsuperscript{146} Oil Consumption in China \url{http://www.oliveoillife.com/en/news/html/152.html}
\textsuperscript{147} Eurostat
\textsuperscript{148} Eurostat
\textsuperscript{149} World Olive Oil Imports Fall \url{http://www.oliveoiltimes.com/olive-oil-business/world-olive-oil-imports-fall/38668}
Pomace oil accounted for just 2.8% of the value of imports in 2014, down from a share of 4.9% in 2011, whilst virgin olive oil contributed 84% of total trade value in 2014. Spain has retained a dominant position in the market and along with trade from Italy, Greece, and Portugal, account for over 99% of import value.
Spanish virgin olive oil exports to China, including GI olive oil like PDO Estepa, rose fairly dramatically between 2010 and 2012, during which time export values almost trebled – from EUR 30,389,222 to EUR 84,176,606 – potentially due to rising health consciousness as a result of the ‘Di Gou You’ illicit gutter oil scandals around 2011, which raised Chinese awareness of the types of oils citizens were consuming, and as a result of rising demand for prestige Western health foods among Chinese middle-income consumers. There was a marginal decline in virgin olive oil exports to China (around 20%) between 2012 and 2014. The decline has been attributed to adverse weather conditions and outbreaks of bacteria, which has killed many mature olive trees in the region.

Regarding ‘regular’ Spanish olive oil exports (‘olive oil and fractions obtained from the fruit of the olive tree solely by mechanical or physical means under conditions that do not lead to deterioration of the oil (excl. virgin and chemically modified’), a steady rise in exports along with GI olive oil occurred between 2010 and 2014 – around 25% over this four year period. According to the Olive Oil Times, this rise might have been linked to the harvest in Greece, which was small and put little pressure on the Spanish market.

Growth drivers and trends
Turnover for local producers of vegetable oils is predicted to grow at a rate of around 15% compound annual growth rate until 2018, driven primarily by increased focus on healthier lifestyles, with increases in the market as a whole able to drive growth of the olive oil market. Consumers focussing on products with health benefits, including olive oil, have been noted to be less price-sensitive, and so can drive increases in the value of sales at higher rates, rather than increases in volume.

Domestic production has made great strides in a short space of time, with estimates of 59 million olive trees being in full production within a few years and production rivalling that of Spain in a decade. Production will not be able to meet demand for the near future, allowing for the continued growth of imports. Future competition from domestic brands may also drive further growth in imports as they increase consumer awareness of olive oil creating a larger consumer base willing to trade up their purchases for high quality imported produce.

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Geography and major markets
Olive oil consumption is primarily concentrated in developed cities such as Beijing, Shanghai, Gaungzhou, Tianjin, and Shenzhen. Market penetration for imported olive oil is low in the vast majority of cities, whilst domestically produced olive oil has been making some inroads in establishing a market presence. Growth areas will be tier 2 and 3 cities within China that have a burgeoning middle class with growing disposable incomes and increasingly prioritise healthy eating.

Olive oil production is based primarily in Central and South Western China in provinces such as Sichuan, Gansu, Yunnan, Shanxi, and Hubei. As domestic production is set to increase more competition from domestic brands can be expected in these growing regions.

Distribution Channels and Intermediaries
Selecting the correct business partner is a key step for building your brand in China. Whilst there are many importers within China with extensive experience for the distribution of olive oil in established markets such as Beijing, Shanghai, and Guangzhou, there are still risks faced from partners and due diligence is a must. Distribution within China is still fragmented, and the awareness of olive oil can be low in many areas; in less well-established markets, selecting a distributor or an intermediary may prove more challenging.

Retail Channels
Olive oil is currently available through a variety of retail channels with specialist stores catering to expats and affluent consumers, hypermarkets and large supermarkets targeting middle class consumers, and e-commerce is increasingly utilised widely by younger consumers particularly for purchases during festivals. Brick and mortar establishments are often useful when establishing a market presence and building brand awareness; however, given the potential for growth and the ability to reach a larger customer base, e-commerce should not be overlooked.

Consumer profiles
Consumers who are currently purchasing or are potential customers for olive oil are middle class or affluent consumers who are trading up food purchases for better quality and healthier choices. Although olive oil can be used instead of traditionally used vegetable oils for preparation of Chinese food, consumers usually emulate European cuisine, modes of consumption, and lifestyles.

Consumers tend to have a higher educational background with 80% of consumers possessing a college diploma and a higher diploma, and 60% of consumers being middle-aged and senior citizens. This can perhaps be due to correlations between higher educational background and greater concern for healthier lifestyles which has been noted for trends of consumption for other products.

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159 “Alcohol consumption in 0.5 million people from 10 diverse regions of China: prevalence, patterns and socio-demographic and health-related correlates” International Journal of Epidemiology 2013;42:816–827
Gifting
Olive oil can be gifted due to its suitable pricing, aesthetically pleasing bottling and packaging, and favourable consumer perception as a healthy imported product. Online sales of imported foodstuffs in the run-up to Chinese New Year offer a potentially lucrative market with impressive growth in recent years.

Market Access and Entry
Olive oil does not face any market access restrictions and all EU exporters who have obtained the Registration of Foreign Exporters of Foodstuffs and are able to fulfil the requirements within relevant Chinese standards and import requirements can enter the market.

Customs procedures
Documentation required for import into China includes:

- Commercial Invoice;
- Packing List;
- Certificate for Registration of Foreign Exporters of Foodstuffs;
- Air Waybill, Rail Waybill, or Bill of Lading;
- Cargo Manifest;
- Insurance Certificate;
- Certificate of Analysis;
- Buyer Seller Agreement signed by both parties (not required at all ports);
- Certificate of Origin (only if requested by the importer).

The following is a list of documentation required to be prepared by importers:

- Customs Registration – for both importer and exporter registration with Customs;
- Customs Import Declaration;
- Automatic import License;
- Business License of Importer;
- Import and Export Business License;
- Certificate for Registration of Importer of Foodstuffs;
- Commodity Inspection Certificate (if this is not the first shipment).

Labelling and standards
The labelling of olive oil products is governed by the provisions of GB 7718-2011 general rules for labelling of pre-packaged foods national food safety standards whilst olive oil is covered under the GB 23347-2009 National Standard for olive oil and olive-pomace oil.
Customs Control
Scrutiny of olive oil imports followed reports of adulteration of olive oil with lower grades and with olive oil from other countries.\textsuperscript{160} In 2014 this resulted in the rejections of shipments and the addition of offending extra virgin olive oil exporters to an AQSIQ blacklist.\textsuperscript{161}

Intellectual Property Rights
The rebottling and sale of pomace oil or other low quality oils as olive oil, as well as the misappropriation of labels and bottles of imported brands, can damage consumer confidence and sales. Control of the supply chain and effective monitoring of the market can minimise risks and allow for timely action in coordination with the relevant Chinese authorities.

The registration of bottle and label designs can also help to prevent against counterfeiters who may capitalise on Chinese consumers more likely to spot changes to the design and visual identity of produce than in slight variations of registered brand names. Increasing consumer awareness can also enable them to better spot fakes and to distinguish between different qualities and grades of olive oil, removing opportunities for counterfeiters.

Case study

Golden Olive Ltd., a European SME producing olive oil and aromatic olive oil is planning to import its range of products into China. The company has participated in trade fairs in Shanghai and Shenzhen in the past year, where it met a few potential Chinese distributors interested in its products. Before participating in the trade fairs, Golden Olive Ltd. had registered its trade marks in both western letters and Chinese characters as it was warned by its lawyer that trade fairs may bring good business opportunities but also generate risks for unregistered IP.

Golden Olive Ltd. is now negotiating with two potential importers and distributors in China, one appointed for the northern region and the second one for central and south China. The negotiations will lead to written distribution agreements including IP related clauses to regulate the use and obligations of both parties with reference to the IPR involved, especially with regard to the registered trademarks and related marketing activities for the brand. At the same time, the company has started the mandatory product and label registration in China.

While trade mark protection has been taken care of in advance, Golden Olive Ltd.’s products are also characterised by a very distinctive packaging including both the shape and the combination of colours of

\textsuperscript{160} China Scrutinizes Olive Oil Imports from Italy \url{http://www.oliveoiltimes.com/olive-oil-business/asia/china-investigates-italian-olive-oil/23810}
\textsuperscript{161} China Names Foreign Brands On Blacklist of Substandard Imports \url{http://www.bna.com/china-names-foreign-n17179882776/}
Please also see the AQSIQ article discussing the issuance of the blacklist \url{http://www.aqsiq.gov.cn/zjxw/zjxw/zjftpxw/201402/t20140228_405109.htm}
the containers. The company would like to use the same packaging in China that has been using in Europe for the past five years, and decided to consult with a China IP lawyer in this respect. The patent design was registered in Europe five years earlier. Unfortunately, the company discovered that since the packaging has already been used in Europe, it can no longer be considered ‘novel’ and is not eligible for design patent protection in China now. Nevertheless, the lawyer suggested that since the current packaging has intrinsic copyright the company can prepare to defend themselves against any future infringement by performing a voluntary copyright registration in China to prove their ownership in the Chinese courts. He also suggested developing a new distinctive packaging specifically for the Chinese market, by using a new shape and new combination of colours which would be more appealing for Chinese consumers. He advised to file the new packaging as patent design in China through domestic registration with the State Intellectual Property Office (SIPO). As an additional measure, Golden Olive Ltd. is advised to register its brochures and catalogue that will be used by its Chinese distributors as copyright to prevent any IPR theft or misuse afterwards.

Through the protection strategy mentioned above, the European SME succeeded in applying a reasonable budget for it China operations by investing in IP prevention in advance, thus minimising the costs of enforcement afterwards.

Source: China IPR SME Helpesk
3.6 Fresh Fruit & Vegetables

Market Snapshot
Demand in China for European fresh fruit and vegetables is relatively modest, as consumer awareness of such products is relatively low in many parts of the country. However, the market is likely to increase as consumers gradually gain knowledge of European fresh fruits and vegetables, per-capita income increases, and national distribution retail and distribution networks improve.

Regional trade partners hold dominant market shares in terms of overall value of exports to China, supplying the market mostly with exotic fruit that is not available from domestic producers. Chinese production of competitively priced and high quality fruits such as apples, pears, and plums constraining demand growth for imports of these products.

Market size and market share
In value terms, the largest importer of fresh fruit into China in 2014 was Thailand, with some EUR 775 million, primarily on the back of increased demand for exotic fruit. Chile ranked second, with imports of approximately EUR 585 million\textsuperscript{162}. The other primary exporters into the Chinese market in 2014 were Vietnam, the Philippines, and the United States\textsuperscript{163}.

In 2014, China’s direct fresh fruit imports increased 22.8%, to 3.3m tonnes, according to figures released by China Customs. Imports of bananas increased 119% over the year, to over 1.1m tonnes. The Philippines was the primary supplier of bananas to China, while Ecuador increased its imports 10-fold to more than 200,000 tonnes. Exotic fruits from South East Asia also increased dramatically. Dragonfruit was the second-most imported fruit after bananas, with a 12% growth in imports to 603,000 tonnes, predominantly from Vietnam, followed by longans and durian, mostly from Thailand. Combined, these four fruits constituted 71% of China's total fresh fruit imports in 2014\textsuperscript{164}.

\textsuperscript{162} US$ figure converted based on a historical average USD/EUR exchange rate of 0.75 for 2014
\textsuperscript{163} Fruit imports in China during 2014 increased 24% with respect to 2013.
\textsuperscript{164} China’s fruit imports grow 23 per cent
In 2014, the EU’s fruit and vegetables imports into China stood at EUR 82 million, an increase of 2.7% over 2013 levels, and an increase of 40.9% over 2011 levels. Italy maintains a dominate share of this trade, with some EUR 26 million worth of fresh fruit and vegetable exports to China in 2014; EUR 23 million of which is from fresh strawberries and other berry imports. Similarly, Sweden, Estonia, Finland, and Latvia held large market shares due to their trade in fruits and nuts.\textsuperscript{165}

\textsuperscript{165} Eurostat
Source: Eurostat

Growth drivers and trends
Chinese per capita fresh fruit consumption stood at 40kgs (88lbs) in 2010, and is forecasted to reach 48kg (106lbs) in 2020 and 53kg (116lbs) in 2030. China consumers have a growing appetite for high quality fruits, such as apples, grapes, cherries, blueberries and citrus fruits. However, stone fruit are less popular among local consumers. Moreover, consumer awareness fruits of that are not native to China is generally low, so the market is relatively modest. Consumers across China are gaining a greater exposure to foreign foods, including imported fresh fruits and vegetables. This will be primarily in the major tier 1 cities, but such appetite is increasingly filtering down to tier 2 and 3 cities, as well as smaller towns. This will help drive demand for European fresh fruits and vegetables over the coming years.

Geography and major markets
Consumers in the northern and central regions of China generally prefer sweet tasting fruits; in contrast, consumers in southern China prefer a wider range of fruits, including guava and carambole (star fruit). However, a growing segment of the population has started to accept fruit with distinctive smells, such as durian, in recent years.

In the Southern region of China, exotic fruit imports from South-East Asia hold the dominant market share. A large majority of China’s imported fruit passes through the Wholesale Market in Guangzhou. Key consumption markets in Southern China include major cities in the Pearl River Delta, such as Guangzhou, Shenzhen, and Dongguan, as well as smaller markets such as Foshan, Zhuhai, Zhongshan, Huizhou, Jiangmen, and Shunde. However, in these regions there is little appetite for European fruit and vegetable imports.

The Western region of China has a long tradition as the country’s “fruit basket”, and is largely self-sufficient in the fruit and vegetable sector. Moreover, there is little demand for imported foods in largely rural parts of China, particularly in the less-developed North-western regions of the country. Accordingly, consumers in the Western region prefer local produce, and sales of imported fruits and vegetables are very low.

Consumption of fresh fruits and vegetables, particularly imported produce, is higher in urban areas compared to rural ones due to a number of factors. Generally, compared to their rural counterparts, urban consumers have higher disposable incomes, greater willingness to eat imported produce, and greater knowledge of the health benefits of a varied diet. Greater access to retail channels, and more

advanced logistical networks that facilitate more efficient distribution of fresh produce, are further factors behind the concentration of demand in developed urban centres.

**Distribution**

Sales of fresh fruit and vegetables across China are hampered somewhat by the paucity of cold-storage transportation in the country. This is particularly true outside of the large tier 1 cities. In recent years, there has been some development in transportation infrastructure with growing volumes of imported fruit and vegetables into China spurring demand for seaborne transport in refrigerated containers. On the back of this development, more perishable goods that were previously transported by air are now shipped by sea freight, reducing transport costs, and thereby reducing prices for consumers. Such developments are likely to spur demand in the segment, as European fresh fruits and vegetables can reach a wider market.

Guangzhou, Shanghai and Beijing are the three major distribution markets for imported fresh fruits and vegetables. The Guangzhou Jiangnan Fruit Wholesale Market is a leading hub for imported fresh fruits, constituting some 70% of the total imports into China.

The majority of fresh fruits and vegetables sold in China are through traditional wet markets, but such retailers rarely stock imported produce. Instead, most European fresh fruits and vegetables are sold through hyper-markets, with large imported sections, and small boutique stores that largely cater to foreigners and wealthy Chinese consumers.

Online sales of fresh produce are rising, particularly for imported European goods, opening up new distribution options for exporters. In 2014, Chinese e-commerce players focused on fresh products developed rapidly. Consumers are able to purchase imported fresh produce via sites such as tmall.com, jd.com, yhd.com, sfbest.com, womai.com, benlai.com, and tootoo.com.

However, due to the current limitations of fresh produce transportation logistics (particularly poor geographical coverage of cold-storage infrastructure networks), consumers in second and third tier cities have relatively limited access to ordering fresh produce online. Despite this, the potential market is large; online fresh product sales revenues increased nearly 41% in 2013, reaching more than EUR 700 million.

**Consumer profiles**

Young, urban residents are the primary target market for European fresh fruit and vegetable in China due to a number of factors. Generally, compared to their rural counterparts, urban consumers have higher disposable incomes, greater willingness to eat imported produce, and greater knowledge of the
health benefits of a varied diet. Moreover, urban consumers have greater access to retail channels that would stock such products, as well as benefitting from being part of more advanced logistical networks that facilitate more efficient distribution of fresh produce.

**Gifting and symbolism of fruits**

In the run up to national holidays, such as Mid-Autumn Festival and Chinese Spring Festival, sales of imported fresh fruits are high, as they are often given as gifts. These gifts are often symbolic with their name in Chinese alluding to bringing good luck or prosperity to the recipient.\(^{171}\) For example, fruits with seeds are important in Chinese New Year celebrations because they are symbolic of the harvest, abundance, and fertility.\(^ {172}\) Although more traditional fruits are often given as gifts at such occasions, as European fresh fruits gain greater acceptance in the market, fruits whose Chinese names have positive connotations may also become part of these traditions.

**Customs procedures**

Documentation required for import into China includes:

- Commercial Invoice
- Packing List
- Certificate for Registration of Foreign Exporters of Foodstuffs
- Air Waybill, Rail Waybill, or Bill of Lading
- Cargo Manifest
- Insurance Certificate
- Certificate of Analysis
- Buyer Seller Agreement signed by both parties (not required at all ports)
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- Customs Import Declaration
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- Certificate for Registration of Importer of Foodstuffs
- Commodity Inspection Certificate (if this is not the first shipment)

**Intellectual Property Rights**

As market penetration for European fruit and vegetables is still relatively low the incentives for counterfeiting, and the risks to IP, also remain relatively low. Nonetheless the registration of all IP

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\(^ {171}\) Food Symbolism during Chinese New Year Celebrations [http://www.nationsonline.org/oneworld/Chinese_Customs/food_symbolism.htm](http://www.nationsonline.org/oneworld/Chinese_Customs/food_symbolism.htm)

should be done prior to the entry to the market or at the earliest opportunity. Monitoring of the market and all stages of the distribution chain is necessary to minimise the risk of any infringements. Given the role of fruit as an important product for gifting, and the additional packaging and presentation that this can entail, registration of packaging designs can help build brand awareness and distinguish produce from domestic or regional equivalents.
3.7 Processed Fruits and Vegetables

Market Snapshot

European processed fruits and vegetables is a small but growing market in China. Indeed, processed fruits and vegetables are still a niche segment due to Chinese consumers’ dietary habits; traditional methods of home cooking support demand for fresh, unprocessed products.

However, the segment is growing as consumer habits change, particularly in urban markets. This is likely to be facilitated by consumers gradually gaining knowledge of European processed fruits and vegetables, increases in per-capita income levels, and improvements in national distribution and retail networks.

Market size and market share

In 2014, China’s total imports of processed fruits and vegetables increased 15.8% over 2013 levels, to EUR 577 million. The majority of China’s processed fruit and vegetable imports come from the United States and the South East Asia region, particularly Thailand, South Korea, and Singapore.

![Graph showing China's global imports of processed fruit and vegetables](chart.png)

Source: ITC Trade Map

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173 ITC Trade Map
174 Global Trade Patterns in Fruits and Vegetables

In 2014, the EU’s imports of processed fruits and vegetables into China totalled EUR 65.9 million. This represents an increase of 29.7% over 2013 levels, and an increase of 65% over 2011 levels. Italy constituted some 24% of the EU’s imports into China in this segment in 2014, with imports of EUR 15.6 million, and Spain contributed some 19.5%, with imports valued at EUR 12.8 million. Within the processed fruit and vegetable segment, the EU’s primary exports to China are fruit juices, fruits and nuts, and prepared or preserved vegetables.\(^{175}\)

**EU exports of processed fruit and vegetables to China by product category (in millions of Euros)**

<table>
<thead>
<tr>
<th>Year</th>
<th>Cucumbers, gherkins and onions preserved by vinegar</th>
<th>Tomatoes prepared or preserved</th>
<th>Mushrooms &amp; truffles, prepared or preserved</th>
<th>Prepared or preserved vegetables nes (incl. frozen)</th>
<th>Prepared or preserved vegetables nes (excl. frozen)</th>
<th>Sugar preserved fruits and nuts</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>2011</td>
<td>3</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>2012</td>
<td>5</td>
<td>4</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>2013</td>
<td>8</td>
<td>6</td>
<td>3</td>
<td>3</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>2014</td>
<td>11</td>
<td>8</td>
<td>4</td>
<td>4</td>
<td>3</td>
<td>1</td>
</tr>
</tbody>
</table>

Source: ITC Trade Map

**Growth drivers and trends**

Demand for processed fruit in China is driven predominantly by the country’s baking industry.\(^{176}\) Premium bakery shops often garnish their products with canned sliced fruit, and this practice is increasingly being adopted across the industry. The baking industry is largely located within China’s large tier 1 cities, although bakeries are increasingly expanding into smaller cities across the country. As this segment expands over the coming years, China’s imports of processed fruits and vegetables from Europe are likely to increase. For further information on the baked good market, please refer to section XXX of this Handbook.

Demand for processed fruits and vegetables is relatively low, but growing. Changes in lifestyle, particularly amongst urban residents, have increased the demand for convenience products, encouraging the consumption of processed products, including vegetable and fruit juices. Moreover,

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\(^{175}\) Eurostat

\(^{176}\) US GAIN Report: Canned Deciduous Fruit Annual

consumers are increasingly health-conscious, and are keen to eat nutritious snacks. Although consumers are becoming more health conscious, they are increasingly time poor. As a result, many buy foods that are easy to prepare, yet healthy.

Consumers across China are gaining a greater exposure to foreign foods, including imported processed fruits and vegetables. This will be primarily in the major tier 1 cities, but such appetite is increasingly filtering down to tier 2 and 3 cities, as well as smaller towns. This will help drive demand for European processed fruits and vegetables over the coming years.

There are, however, several factors that may impede growth in China’s processed fruits and vegetables market. Many consumers in the country place a strong priority on the freshness of food, which may constrain sales of processed products. This cultural bias may take some time to overcome, particularly amongst senior consumers. Moreover, the preference for fresh food is increased by the media’s focus on scandals in the food-processing industry.

**Geography and major markets**

The northeast region of China has the highest consumption of canned fruits in the country. This is largely driven by the baking industry, which uses processed fruit to cater to their preference for sweet fruits and desserts.

In the Southern region of China there is little appetite for European processed fruit and vegetable imports as exotic fresh fruit imports from South East Asia hold the dominant market share. A large majority of China’s imported fruit passes through the Wholesale Market in Guangzhou. The ready availability of a wide range of fresh produce acts as a constraint for growth in demand for processed products with a longer shelf life.

The Western region of China has a long tradition as the country’s “fruit basket”, and is largely self-sufficient in the fresh fruit and vegetable sector. Moreover, there is little demand for imported foods in largely rural parts of China, particularly in the less-developed North-western regions of the country. Accordingly, consumers in the Western region prefer local produce, and sales of imported processed fruits and vegetables are very low.

Consumer demand for imported processed fruits and vegetables is greatest in urban areas, as consumers place importance on convenient, nutritious food. Urban residents have higher disposable incomes, and are generally more willing to eat imported, processed products than their rural counterparts. Moreover, urban residents benefit from their location near the primary retail channels for imported processed fruits and vegetables.

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177 US GAIN Report: Canned Deciduous Fruit Annual
Distribution
Processed fruits and vegetables are easier to transport than fresh produce, as they require little to no cold storage facilities, and can withstand greater variations in temperature during transit. Moreover, many processed fruits and vegetables have a relatively long shelf-life, and can be stored for greater periods of time before consumption. These factors should be conducive to facilitating broader geographic sales across China; indeed, as consumer demand across the country increases, distributors and retailer should be well-placed to improve sales in a number of markets.

The majority of processed fruits and vegetables sold in China are through the food service sector, such as bakeries, luxury hotels, VIP clubs, and karaoke bars. Processed fruits and vegetables in China targeted to individual consumers are mainly sold through hypermarkets and supermarkets, as traditional wet markets sell predominantly live and fresh produce, with very little processed fruits and vegetables. For many consumers across China, particularly outside the large tier 1 cities, such markets are the primary retail channel, limiting access to imported processed fruit and vegetable products.

Consumer profiles
The market for processed fruits and vegetables labelled as healthy and nutritious has seen strong growth in recent years as consumers in China become increasingly health-conscious. Indeed, ready-to-eat snacks that are also nutritionally beneficial are an ideal choice for busy, urban professionals seeking a convenient, healthy snack between meals.

Similarly, parents are keen to provide their children with nutritious snacks, and processed fruits and vegetables are a convenient option. These consumers will be less price sensitive when making purchases for young children as often the purchasing motivation is improvement of nutritional intake and trading up.

Packaging
In China, packaging is very important. Indeed, consumers often inspect fruit products before purchasing, so producers often use transparent or glass jars to better facilitate visual inspection. Moreover, transparent and glass containers are held in higher regard than tinned products.

Customs procedures
Documentation required for import into China includes:

- Commercial Invoice
- Packing List
- Certificate for Registration of Foreign Exporters of Foodstuffs

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178 US GAIN Report: Canned Deciduous Fruit Annual

179 Consumer goods and retail report

180 US GAIN Report: Canned Deciduous Fruit Annual
• Air Waybill, Rail Waybill, or Bill of Lading
• Cargo Manifest
• Insurance Certificate
• Certificate of Analysis
• Buyer Seller Agreement signed by both parties (not required at all ports)
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• Commodity Inspection Certificate (if this is not the first shipment)

**Intellectual Property Rights**

Distribution channels for processed fruit and vegetables are diversifying and there is a need to have appropriate IP strategies for these channels. The registration of design patents is important where the packaging is not of standardised designs and is important for recognition by Chinese consumers.

Active monitoring of the supply chain and of market places, even where products are not currently sold, is important to minimise the risk of counterfeiters capitalising on the reputation of higher quality for imported products. This risk may be more pronounced in lower tier cities where consumers have less brand awareness and will be less able to identify counterfeit goods.
3.8 Dairy Products

Market Snapshot
The dairy market has seen significant growth in recent years as consumer demand has outpaced domestic production growth. Traditionally dairy products have not played a large part in Chinese diets with production and consumption limited geographically. In recent years, however, rising incomes have spurred changes in diet.

The market does not come without its challenges though, with food safety scandals lowering consumer confidence, market access restrictions, and strong competition making market entry a challenge for some exporters. Consumers still remain cautious in their purchases and, whilst they are less price sensitive, they will be highly sensitive to any food safety issues. The value of EU exports has shown significant growth in recent years, New Zealand still holds a dominant position on the market. Market access is not universal for the EU as some Member States do not yet have the necessary bilateral protocols and sanitary certificates in place and company level registration processes in some cases being lengthy.

Market size and market share
Increases in production for dairy produce have been low compared to the growth of domestic demand. Production increased 2.3% per year in 2011 and 2012, declined by 5.7% in 2013 only to rise by 5.5% in 2014. China’s imports of dairy products have grown in value year on year; in 2010 the value of imports stood at EUR 1.48 billion, by 2014 this had risen to EUR 4.82 billion.

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181 Milk production and dairy imports in milk equivalent: [http://www.clal.it/en/?section=stat_cina](http://www.clal.it/en/?section=stat_cina)
182 ITC Trade Map
The most significant exporter of dairy produce to China is New Zealand, which enjoys a dominant position across several product categories for dairy produce.
Exports from the EU for all product categories showed an increase in value between 2011 and 2014, the only decline in value came from powdered milk, which saw a dip in value of 16.6% from 2013 to 2014.\textsuperscript{183}

\begin{figure}
\centering
\includegraphics[width=\textwidth]{eu_dairy_exports_china}
\caption{EU exports of dairy products to China by product category (in millions of Euros)}
\end{figure}

Source: Eurostat

For uncondensed and unsweetened milk and cream France and Germany held a collective share of 81% of the EU’s export value to China in 2014. In the same period export value shares were spread more evenly for condensed or sweetened milk or cream, with France, Germany, Ireland, and the Netherlands holding a collective share of 63%. The Netherlands held a lead share of yoghurt and buttermilk exports to China in 2014, accounting for 75% of EU export value in this category. The market for whey and other natural milk products was led by France in terms of export value, followed by the Netherlands, Finland, Germany, and Ireland.

For EU cheese exports to China in 2014 France, Italy, Denmark, and the Netherlands held a collective share of 83% of EU export value.

\textsuperscript{183} Eurostat
EU dairy products export to China in 2014: value share of exports by country of origin

Source: Eurostat
Exports of Gorgonzola cheese including PDO Gorgonzola cheese from Italy to China grew exponentially between 2010 and 2013, from EUR 7,856 (million) to EUR 257,653 (million). One explanation for this rise is a marketing stunt undertaken by the leading Italian Gorgonzola producer, Igor, where the chef of Milan’s best Chinese restaurant was paid to star in a video where he prepared a dish incorporating Italy’s famous soft cheese.\(^\text{184}\) Between 2013 and 2014, however, Gorgonzola figures declined by over 50% to EUR 94,566 (million).

While limited figures are available, statistics show that exports of French PDO Roquefort to China have also grown significantly in recent years; from around EUR 324 (million) in 2011 to EUR 15,862 (million) by the final quarter of 2014. This figure is most likely due to rising demand for Western dairy products as tastes for foreign foods have grown.

Italian Grana Padano along with PDO Grana Padano has maintained a relatively high export rate over the period 2010-2014, although export figures were especially high during 2012 and 2014. The decline in Grana Padano and PDO Grana Padano exports in 2013 might be attributed to several economic factors, including the strengthening of the Euro and the slowing down of the Chinese economy.\(^\text{185}\)

![Grana Padano exports 2010-2014 (millions of Euros)](image)

**Source: Eurostat**

Feta cheese, including PDO Feta, exports to China from Greece grew steadily but significantly between 2010 and 2013 from EUR 66,273 (million) to EUR 180,660 (million). However, a significant decline in Feta


exports to China was observed in 2014 (where figures declined to roughly one third of 2011 export values) due to diminishing demand from Chinese consumers.\(^\text{186}\)

**Growth drivers and trends**

Changing diets will help to drive the growth of dairy imports into China,\(^\text{187}\) and there is plenty of room for growth in the market as per capita consumption is still relatively low. Annual consumption of cheese, for example, stands at just 25g, whereas in France annual consumption is around 26kg.\(^\text{188}\) China will continue to have consumption of dairy produce outpace production driving demand for imported produce. Consumption has been predicted to rise 38% by 2022 with imports rising 20% with skimmed and whole milk powder accounting for 82% of total dairy imports.\(^\text{189}\).

Growth of the overall market and Chinese producers’ desire to diversify their suppliers,\(^\text{190}\) should be able to drive the growth of exports from the EU. Although the majority of milk currently comes from New Zealand, industry experts have pointed out that any new demand in the fast-growing market will likely be sourced from Europe.\(^\text{191}\) IFCN Dairy Research Centre estimates that growth in Chinese imports could soak up all of the extra supply it forecasts in the EU by 2020, or some 7.5 million tonnes in new milk output expected to come mainly from core producing regions like Ireland and a northern European coastal belt running from Denmark down to northwest France.\(^\text{192}\)

Domestic food scandals had once propelled the growth of milk and whey powder imports into China, similar spikes and growth in imports are, however, not guaranteed as imported produce has also faced safety issues in the years since. A lack of consumer confidence in domestic brands following the 2008 melamine scandal had meant that imported produce was seen by consumers as more reliable and safer.\(^\text{193}\) The industry took a dent when imported dairy produce also became the subject of

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\(^{190}\) Chinese want to sell British milk at £3 per litre [http://www.telegraph.co.uk/finance/china-business/10376454/Chinese-want-to-sell-British-milk-at-3-per-litre.html](http://www.telegraph.co.uk/finance/china-business/10376454/Chinese-want-to-sell-British-milk-at-3-per-litre.html)


food safety concerns, such as with the contamination of milk powder from New Zealand with clostridium botulinum in 2013.\textsuperscript{194} Negative impacts from any further domestic scandals could once again cause a surge in demand for imported produce; conversely safety issues for imported produce could cause temporary collapses in the market, making predictions as to future growth difficult.

**Geography and major markets**
Dairy product consumption varies considerably across China as in many regions milk has not been part of the local diet,\textsuperscript{195} while consumption is higher in regions where there is a longer history of production such as Inner Mongolia, Shanghai, Beijing, and Tianjin. Consumption in rural regions is less than 10% of that in urban areas.\textsuperscript{196}

The most established regions for dairy produce will be developed tier 1 cities where there is the highest concentration of middle class and affluent consumers. As retailers seek to expand into tier 2 and 3 cities consumers in these markets will have increasing availability of dairy produce, and growth in these areas will drive industry growth in future years.

For cheese, a more niche market exists in large urban markets where foodservice options such as restaurants, hotels, and bakeries are more prevalent and offer more Westernised products. The main markets are Shanghai, Beijing, Guangzhou, and Tianjin,\textsuperscript{197} with minimal presence in other markets.

**Distribution and Logistics**
In larger cities like Beijing, Shanghai, Guangzhou and Chengdu dairy companies use modern retail channels instead of dairy distributors and these channels provide a greater variety of dairy products at lower price. Distribution channels in smaller regional cities and rural areas are, however, improving. Modern retailers are now opening more new stores in these cities as the markets in first and second tier cities become saturated\textsuperscript{198}. Around 80% of dairy products reach consumers via retailers\textsuperscript{199}; however for cheese only 20% of products

\textsuperscript{194} Confidence in imported milk powder damaged \url{http://news.xinhuanet.com/english/china/2013-08/05/c_132604261.htm}
\textsuperscript{195} Consumption of Dairy Products in Urban China: Results from Beijing, Shanghai, and Guangzhou \url{http://iis-db.stanford.edu/pubs/21640/dairyydemand_3cities_final_manuscript.pdf}
\textsuperscript{197} Growing consumption of processed cheeses in China \url{http://www.bordbia.ie/industry/manufacturers/insight/alerts/Pages/GrowingconsumptionofprocessedcheeseinChinasurbancentres.aspx?year=2014&wk=31}
Cold chain logistics will act as a constraint for the distribution of dairy produce within China as current capacity is insufficient for market needs. By the end of 2013, the total capacity of cold storage lagged behind developed countries as well as some developing economies. Total capacity was less than 20 million cubic meters with fewer than 40,000 refrigerated vans. Improvements can be expected as a result of the Cold Chain Logistics Development Plan of Agricultural Products; however geographical coverage may still be limited for the short to medium term.

**Consumer profiles**

The most important demographic for dairy products will be families with young children, where consumers are motivated to have better calorific and nutritional intake and so are increasing the amount of dairy produce in their diets. The nutritional value of dairy products is one of the main factors in purchasing decision making, with consumers being less price sensitive for purchases. The market for infant milk formula is dependent upon consumers’ perception of nutritional values and health benefits of these products when compared with breast milk or other products. Families with young children will continue to priorities the safety of the products that they are buying and will weigh carefully potential health benefits of products on the market.

Young consumers who emulate Western lifestyles are an important consumer base for cheese. A recent trend has been purchasing cheese as an ingredient for homemade pizzas, as inexpensive way to enjoy Western food alone or with friends. Cheese is most popular among children, and parents are willing to purchase it due to its nutritional value.

Chinese consumers, who have lived, studied, or travelled abroad, are an important subgroup of consumers for artisanal cheeses, due to their increased product awareness and demand. Having gained more exposure to Western cuisine, they are more informed on the varieties of products available and will make purchases as part of their broader lifestyle.

**Safety concerns**

Arguably the most serious food health scandal in China was the 2008 melamine scandal, which had significant effects on the dairy industry in China as well as food safety supervision systems. The scandal involved the sale of tainted infant milk formula, as a result of consuming these products 6 children died and

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200 Growing consumption of processed cheeses in China  
http://www.bordbia.ie/industry/manufacturers/insight/alerts/Pages/GrowingconsumptionofprocessedcheesesinChinaurbancentres.aspx?year=2014&wk=31

201 China Cold Chain Logistics Market Research Report 2014-2018  

202 Euromonitor report: Dairy in China  

203 Milk quality in China  
http://www.milkproduction.com/Library/Editorial-articles/Milk-quality-in-China-

204 China’s “Wine & Cheese Boom” Gains Strength  

205 The Market for Dairy Products in China  
thousands were hospitalised.\textsuperscript{206} Consumer confidence was damaged and the effect on the domestic dairy industry was severe.\textsuperscript{207}

Ensuring that your product has a solid reputation for safety is a must for long term success in the Chinese market, losing consumer confidence due to a health scandal may spell the end of business in China. As a way to allay consumer fears and to improve food safety systems Nestlé opened a research and development centre in Beijing for testing of products for chemicals such as melamine.\textsuperscript{208}

**Lactose intolerance**

Dairy production and consumption is not as frequent or as established as in Europe and lactose intolerance or lactase deficiency levels are high. Studies have put the rate as high as 30\% amongst children with some level of lactose malabsorption affecting 92.3\% of adults.\textsuperscript{209,210} Increased dairy consumption from younger ages could potentially lower this rate in the future; for now, however, it acts as a constraint on consumption.

**Pungent food**

As cheese is a new flavour for many Chinese, more pungent varieties can discourage uninitiated consumers.\textsuperscript{211} In a 2013 taste test, most Chinese respondents asked to sample a range of European cheeses said they disliked the smell of the most potent cheeses, although many of those that sampled the products rated these favourably.\textsuperscript{212} Chinese cuisine has its own share of pungent food with stinky tofu (臭豆腐) and Beijing specialty douzhi (豆汁). The popularity of these dishes within China means that there is a considerable consumer base that will not turn their nose up at pungent foods, although, perhaps only when they have gained a taste for these products.

\textsuperscript{206} Melamine – China Tainted Baby Formula Scandal
http://topics.nytimes.com/top/reference/timestopics/subjects/m/melamine/index.html

\textsuperscript{207} China Milk Scandal Spreads; Hong Kong Girl Sickened

\textsuperscript{208} Nestlé Combats China Food Scandals


\textsuperscript{210} Prevalence of primary adult lactose malabsorption in three populations of northern China.

\textsuperscript{211} Euromonitor Report: Cheese in China http://www.euromonitor.com/cheese-in-china/report

\textsuperscript{212} For all the cheese in China http://www.chinaeconomicreview.com/all-cheese-china
Market Access and Entry
Imported dairy produce has been subject to increased scrutiny and tighter controls as China has strengthened its regulations and national standards to improve food safety. Dairy products are subject to market access restrictions and bilateral protocols and sanitary certificates between the country of origin and China, company level registration and on-site inspection, and strict import procedures prior to its entry into the Chinese market.

AQSIQ published Decree No. 152/2013 “Administrative Measures on the Inspection, Quarantine and Supervision of Imports and Exports of Dairy Products” establishing the need for signed protocol between the country of origin and China in Article 5. The completion of a health or sanitary certificate is mandated in Article 7 and the sample certificate once approved is published on the AQSIQ website.

Market access for dairy produce is not currently available for all EU MS due to a lack of a bilateral protocol and/or a lack of a health or sanitary certificate. Producers from countries without current market access are advised to contact their relevant local authorities for information on the current status of any on-going procedures.

EU Member States with Established Sanitary Certificates:

<table>
<thead>
<tr>
<th>EU MS</th>
<th>Sample Sanitary Certificate</th>
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<tbody>
<tr>
<td>Austria</td>
<td><a href="http://jckspaq.aqsiq.gov.cn/xz/gghrzpzsysb/201111/P020111107414087094738.pdf">http://jckspaq.aqsiq.gov.cn/xz/gghrzpzsysb/201111/P020111107414087094738.pdf</a></td>
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Establishment level registration process
In addition to the foodstuff exporter registration Decree No. 152/2013\textsuperscript{213} Article 7 requires all overseas food producers that export dairy produce to China to register with AQSIQ prior to the shipment of any goods.

Registration with AQSIQ was required before May 1\textsuperscript{st} 2014 with the completion of:

Overseas Production Enterprise Registration Form
Questionnaires on Registration of Foreign Plants Producing Dairy Products for Export to China
Attachment to the Questionnaires – Production and Equivalency Form
Sample of Official Declaration of Compliance
List of Dairy Plants Applying for Registration Exception

For the above forms only the first is to be filled in by the individual company, the rest will be filled in by the competent authorities within your country. The timeframe for new registrations varies for each state and will be negotiated between local authorities and the Chinese authorities; exporters wishing to register their company should make enquiries with the relevant authorities on the timetable for new applications.

On-site inspection is possible by members of CNCA and AQSIQ is possible for all dairy producers who have submitted an application.

When a company has been successfully registered it shall be published on the AQSIQ website.

\textsuperscript{213} The official Chinese text is available on the AQSIQ website
CNCA application form for overseas manufacturers of milk based infant powder (left) and questionnaire of overseas manufacturer registration for exported dairy products (right)

Available for download from: [http://www.cnca.gov.cn/ywzl/gjgnhz/jkzl/]

Approved European Exporters for Dairy Products:

**Infant formula milk powder**

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Available at: [http://www.cnca.gov.cn/ywzl/gjchnz/jkzl/](http://www.cnca.gov.cn/ywzl/gjchnz/jkzl/)
### Dairy Products (other than infant formula milk powder)

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Available at: [http://www.cnca.gov.cn/ywzl/gjgnhz/jkzl/](http://www.cnca.gov.cn/ywzl/gjgnhz/jkzl/)
Customs, SPS requirements, and Labelling

For first time imports customs requirements are more stringent and the total customs clearance timeframe will be longer than for subsequent shipments. Given the number of high profile food health scandals involving both domestic and imported dairy produce, customs procedures are more stringent than for most other products entering the market.

Customs procedures

Documentation required for import into China includes:

- Commercial Invoice
- Packing List
- Certificate for Registration of Foreign Exporters of Foodstuffs
- Air Waybill, Rail Waybill, or Bill of Lading
- Cargo Manifest
- Insurance Certificate
- Certificate of Analysis
- Buyer Seller Agreement signed by both parties (not required at all ports)
- Certificate of Origin (only if requested by the importer)

The following is a list of documentation required to be prepared by importers:

- Customs Registration – for both importer and exporter registration with Customs
- Customs Import Declaration
- Automatic Import License
- Business License of Importer
- Import and Export Business License
- Certificate for Registration of Importer of Foodstuffs
- Commodity Inspection Certificate (if this is not the first shipment)
- Permit to Import Live Animals and Plants Subject to Quarantine

Labelling

Labelling of dairy produce is subject to the requirements under various National Standards governing dairy products as well as GB 7718-2011 general rules for labelling of pre-packaged foods national food safety standards.

First time import procedures

The procedures for first time imports of dairy produce are detailed under article 11 of Decree No. 152/2013. First time imports are required to be tested in line with the relevant National Standards, a first-time test report will be issued which can be used for future imports if they are done under the

214 The official Chinese text is available on the AQSIQ website
same conditions. For non-first test products entering China these will be required to provide a copy of the first-time test as well as additional tests for substances as required by AQSIQ.

If a product has fails a test then future imports will be treated as first-time imports, and will therefore be subject to more stringent testing and customs requirements.

**Infant Formula import procedures**

Exporters of infant formula will need to present evidence of their Registration of Foreign Exporters of Infant Formula

Upon customs declaration with CIQ dairy exporters are required to produce a health certificate based upon the certificate agreed upon between the country of origin and China. The certificate is required to indicate information such as:

- The raw materials of the dairy products come from healthy animals;
- The dairy products do not have and will not transfer animal epidemics through processing;
- The dairy producer is under supervision of the competent authority in the region where it operates;
- The dairy products are safe and fit for human consumption.
- The content of required documentation may be subject to change, all exporters should confirm with their importer that all documents have the necessary information presented according to proscribed formats.

**Infant Formula-related provision in the 2015 new Food Safety Law**

On 25 April 2015, China announced the new Food Safety Law. This is the final rule and will be in effect on **October 1, 2015**. It particularly added provisions about the infant formula milk powder as listed below:

**Article 81** Enterprises that produce infant formula shall implement full-process quality control from incoming materials to outgoing finished products and inspect the outgoing infant formula food batch by batch, so as to ensure food safety.

Raw materials and food additives such as fresh milk and ancillary materials used in the production of infant formula food shall comply with laws, administrative regulations, and national food safety standards so as to ensure that the nutrient ingredients necessary for the growth of infants are included.

Enterprises that produce infant formula shall file the food raw materials, food additives, product receipts, and labels with food and drug administration of the people’s governments of provinces, autonomous regions, and municipalities directly under the Central Government.

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Product receipts of infant formula milk powder shall be registered with the food and drug administration under the State Council. Receipt research and development reports and other materials proving scientificity and safety shall be furnished upon filing.

Infant formula milk powder may not be produced in of sub-assembly and the same enterprise may not produce infant formula milk powder of different brands with the same receipt.

**Article 82** The registrant or filer of health care food, food for special medical purposes, and infant formula powder shall be liable for the authenticity of materials it submitted.

Food and drug administrations of the people's governments at the provincial level or above shall issue the catalogues of registered or filed health care food, food for special medical purposes, and infant formula milk powder and shall maintain the confidentiality of business secrets made known by registration or filing.

The enterprises that produce health care food, food for special medical purposes, and infant formula milk powder shall organize their production according to the technical requirements of their registered or filed product receipts and production processes.

**Article 83** Enterprises that produce health care food, food for special medical purposes, infant formula and other staple and supplementary food for specific populations, shall regularly conduct self-inspections of system operations in accordance with GMP and the production quality management system suitable for the food they produced so as to ensure their effective operation, and shall submit the self-inspection reports to the food and drug administration of the competent people’s governments at the county level.

**National Standards**

There are a large number of National Standards applicable to Dairy Produce that exporters should be familiar with prior to entering the market. National Standards are subject to change, and all EU exporters should confirm that products are conformity with the latest standards prior to initiating shipping procedures.

The following is a non-exhaustive list of National Standards applicable for dairy produce:

- GB 19301-2010 Raw milk
- GB 19645-2010 Pasteurised milk
- GB 25190-2010 Sterilised milk
- GB 25191-2010 Modified milk
- GB 19302-2010 Fermented milk
- GB 19644-2010 Milk powder
- GB 11674-2010 Whey powder and whey protein powder
- GB 19646-2010 Cream butter and anhydrous milk fat
- GB 10765-2010 Infant formula
- GB 10767-2010 Older infants' and young children’s formula
- GB 10769-2010 Cereal-based complementary foods for infants and young children
- GB 10770-2010 Canned complementary foods for infants and young children
- GB 12693-2010 Good manufacturing practice for dairy products
- GB 23790-2010 Good manufacturing practice for powdered formula for infants and young children
- GB 541333-2010 Determination of specific gravity in raw milk
- GB 541330-2010 Determination of impurities in raw milk and dairy products
- GB 541334-2010 Determination of acidity in raw milk and dairy products
- GB 54133-2010 Determination of fat in foods for infants and young children, raw milk, and dairy products
- GB 541329-2010 Determination of solubility in foods for infants and young children, raw milk, and dairy products
- GB 541327-2010 Determination of fatty acids in foods for infants and young children, raw milk, and dairy products
- GB 54135-2010 Determination of lactose and sucrose in foods for infants and young children, raw milk, and dairy products
- GB 54136-2010 Determination of insoluble dietary fibre in foods for infants and young children, raw milk, and dairy products
- GB 54139 -2010 Determination of vitamin A, D, E in foods for infant and young children, raw milk, and dairy products
- GB 541310-2010 Determination of vitamin K1 in foods for infants and young children, raw milk, and dairy products
- GB 541311-2010 Determination of vitamin B1 in foods for infants and young children, raw milk and dairy products
- GB 541312-2010 Determination of vitamin B2 in foods for infants and young children, raw milk, and dairy products
- GB 541313-2010 Determination of vitamin B6 in foods for infants and young children, raw milk, and dairy products
- GB 541314-2010 Determination of vitamin B12 in foods for infants and young children, raw milk, and dairy products
- GB 541315-2010 Determination of vitamin niacin and niacin amide in foods for infants and young children, raw milk, and dairy products.
- GB 541316-2010 Determination of folic acid (folate activity) in foods for infants and young children, raw milk, and dairy products
- GB 541317-2010 Determination of pantothenic acid in foods for infants and young children, raw milk, and dairy products
- GB 541318-2010 Determination of vitamin C in foods for infants and young children, raw milk, and dairy products
- GB 541319-2010 Determination of free biotin content in foods for infants and young children, raw milk, and dairy products
- GB 541321-2010 Determination of calcium, iron, zinc, sodium, potassium, magnesium, copper, and manganese in foods for infants and young children, raw milk, and dairy products.
- GB 541322-2010 Determination of phosphorus in foods for infants and young children, raw milk, and dairy products
- GB 541323-2010 Determination of iodine in foods for infants and young children, raw milk, and dairy products
- GB 541324-2010 Determination of chlorine in foods for infants and young children, raw milk, and dairy products
- GB 541325-2010 Determination of inositol in foods for infants and young children, raw milk, and dairy products
- GB 541326-2010 Determination of taurine in foods for infants and young children, raw milk, and dairy products
- GB 541335-2010 Determination of β-carotene in foods for infants and young children, raw milk, and dairy products
- GB 541336-2010 Determination of trans fatty acids in foods for infants and young children, raw milk, and dairy products
- GB 541337-2010 Determination of aflatoxin M1 in milk and dairy products
- GB 50095-2010 Determination of protein in foods
- GB 50093-2010 Determination of moisture in foods
- GB 50094-2010 Determination of ash in foods
- GB 500912-2010 Determination of lead in foods
- GB 500933-2010 Determination of nitrite and nitrate in foods
- GB 500924-2010 Determination of aflatoxins M1 and B1 in foods
- GB 500993-2010 Determination of selenium in foods
- GB 21703-2010 Determination of benzoic and sorbic acid in milk and dairy products
- GB 22031-2010 Determination of added citrate content in cheese and processed cheese products
- GB 541338-2010 Determination of freezing point in raw milk
- GB 47892-2010 Microbiological examination in foods – Aerobic plate count
- GB 47893-2010 Microbiological examination in foods – Enumeration of coliforms
- GB 47894-2010 Microbiological examination in foods – Examination of salmonella
- GB 478910-2010 Microbiological examination in foods – Detection of staphylococcus aureus
- GB 478915-2010 Microbiological examination in foods – Examination of moulds and yeasts
- GB 478918-2010 Microbiological examination in foods – Examination of milk and milk products
- GB 478930-2010 Microbiological examination in foods – Examination of listeria monocytogenes
- GB 478935-2010 Microbiological examination in foods – Examination of lactic acid bacteria in foods
- GB 478940-2010 Microbiological examination in foods – Examination of enterobactersakazakii
- GB 541339-2010 Determination of non-fat total milk solids in milk and milk products

Source: EU SME Centre “Guideline: Importing Dairy Products into China”
Intellectual Property Rights

Given the lack of confidence in many domestic brands of milk powder, counterfeiters may be inclined to infringe the IPR of foreign brands. Whilst consumers are generally highly discerning in their purchases, the negative impact of food safety scandals for dairy products, and the loss of market share and even market access that can result, necessitates the active enforcement of IPR on the market to prevent the possibility of counterfeit goods being the source of food safety scandals.

Domestic production of dairy products, such as cheese, is limited in scale and difficulties in production make counterfeiting less prevalent. Risks are not to be underestimated as consumer awareness of certain imported brands is rising faster than exposure to products. With increasing market size IP risks will be set to increase especially for those producers who do not register all of their IP in a timely manner.
3.9 Processed Cereals

Market Snapshot

The processed cereals market in China has registered strong growth in recent years, particularly driven by young, urban professionals seeking convenient, healthy food options, although sales volumes remain relatively low. Nevertheless, there is growing interest in Western lifestyles and cuisine, and this should help drive sales in the future. Moreover, some pasta types, such as spaghetti, also benefit from their similarity to noodles, a staple food in China, aiding their acceptance amongst consumers.

Market size and market share

China’s total imports for pasta and breakfast cereals stood at EUR 148 million in 2014\textsuperscript{216}. This represents an increase of 29% over the 2013 value, and an increase of 138% over the value in 2011. The main non-European exporting countries of processed cereals to China are Chinese Taipei, Hong Kong, South Korea, and the USA. For pasta and couscous it is regional trade partners that are the main competitors with the EU in terms of export value.

\textbf{Source: ITC Trade Map}

\textsuperscript{216} ITC Trade Map
The breakfast cereal market has a wider range of countries engaged in the Chinese market. The leading exporter to China in terms of value is currently the USA; however their market share has decreased from 27.6% in 2011 to 23.5% in 2014. Regional partners such as Chinese Taipei, and the Republic of Korea are other major exporters.

In 2014, EU exports of pasta and breakfast cereals to China stood at EUR 26.4 million, an increase of 16.6% over 2013 values, and an increase of 123% over 2011 levels. Some 53% of the EU’s processed cereal exports, predominantly pasta, come from Italy, with EUR 13.9 million worth of exports to China in 2014. Other significant EU exporters to China are Germany, Greece, and Spain.

Growth drivers and trends
The sales of pasta have, to date, been restricted by low consumer awareness and a lack of knowledge on how to prepare European dishes. A growing number of consumers travelling abroad and a greater interest in European lifestyle and food culture will help to drive future growth. Research has indicated that pasta is also well placed for growth, in part from high consumer acceptance due to its similarity to noodles, and also due to its status as an ‘exotic food’ which resonates with increasingly curious consumers. Growth between 2014 and 2019 has been predicted to be at 9% value CAGR.

Source: ITC Trade Map

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217 ITC Trade Map  
218 Eurostat  
Breakfast cereals have, and are set to continue, year on year positive growth due to changing food habits where breakfast cereals are now included into an increasing number of Chinese consumers’ regular meals.\(^{221}\) The acquisition of a majority share of Weetabix by Chinese food maker Bright Foods is just one of many joint ventures and acquisitions significant for the breakfast cereal market. These industry moves indicate that domestic and international food companies see breakfast cereal in China as a promising growth market, and that competition may become fiercer as domestically produced cereals expand the amount of competitively priced options available.

A potential constraint for the market growth of breakfast cereals comes from the dairy market within China and consumer concerns over the safety of milk and other dairy produce. Recent milk scandals in China have slowed growth in the market somewhat, as some consumers are reticent to purchase milk and related products.\(^{222}\) Any future scandals over the safety of domestic or imported milk could have further knock on effects causing contractions in the breakfast cereal market. Cereal bars and other processed cereal products not served with dairy produce should be able to avoid adverse effects as indicated from their previous performance during these events.\(^{223}\)

**Geography and major markets**

Different regions in China have notable differences in typical consumer behaviour and these motivations should be accounted for in marketing and sales strategies. High-quality and healthy lifestyle considerations are the two main driving forces behind value growth of processed cereals in Eastern China; in Southern China labelling and quality standard marks are an important motivation for purchases; and in Northern China functional and fortified foods such as healthy breakfasts are gaining ground.\(^{224}\)

Central China is a growth market due to rising incomes and increasing consumer demand for imported produce and staple foods however North-western China has limited growth due to constraints from lower incomes. Tier 1 cities remain the most developed markets for imported processed cereals however tier 2 and 3 cities can be drivers of future growth if distribution issues can overcome and brand positioning mitigates against price consumers being more price sensitive in these markets.

**Distribution**

Until recently breakfast cereals were only available in specialist stores catering to the expatriate community in various tier 1 or 2 cities in China. As this product’s popularity has increased so distribution

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\(^{221}\) Global Market Study on Breakfast Cereals: Hot Cereals to Witness Highest Growth by 2019  

\(^{222}\) Kellogg To Bring Cereal To China Due To Increased Milk Consumption  

\(^{223}\) Kellogg To Bring Cereal To China Due To Increased Milk Consumption  

\(^{224}\) The Chinese Food Market. Opportunities for Swiss Companies  
options have increased. Supermarkets and hypermarkets are now stocking wider selections of imported cereals, albeit with a limited amount of store space dedicated to this. Many supermarket retailers have relatively well-integrated distribution systems and are receptive to imported products offering high margins, especially if these are relatively small chains that are geographically concentrated. Supermarkets are currently under pressure from hypermarkets and internet retailing due to price competition, distribution strategies with diversified retail channels can potentially mitigate the impacts of increased competition in the retail sector.

The foodservice industry is a major driver of processed cereal consumption in China as consumers, particularly young urban residents, increase their consumption of imported foods through this industry. For pasta and couscous dining away from home will be the main mode of consumption and so distribution through hotels restaurants and cafes will allow for higher volumes of trade compared to supermarkets or hypermarkets. Distribution is still fragmented and so distribution and logistics partners may only have coverage of one city rather than at the provincial level.

**Consumer profiles**

Key consumers for pasta will be those emulating Western eating habits and lifestyle and will include young professionals and middle class and affluent households. Younger consumers who have had increased exposure to Western food through fast food chains will also be receptive to these products and may make purchases for preparation at home.

The breakfast cereal market appeals to consumers with varied motivations such as health, convenience, and lifestyle choice. Young professionals with an on-the-go lifestyle can be drawn to breakfast cereal as a way to save time. Older consumers and families with young children will be motivated more by the nutritional value of products with consumers purchasing for children being less price sensitive.

**Specific product preferences**

For processed cereals Chinese consumers show a preference to products that have the most similarities with local equivalent foods and will shy away from purchases of specific product varieties that they have lower awareness of. In terms of preference consumers typically opt for muesli-like brands because of their similarity to local products and that they contain dried fruits and/or nuts. Other manufacturers have gone further and are offering products containing traditional ingredients such as red dates, goji berries, and sesame, which can not only boost the credentials of these products as health foods but also present consumers with more familiar product offerings.

Pasta in Chinese is colloquially referred to under the umbrella term of “Italian noodles” and awareness is highest for spaghetti which is the closest equivalent to the majority of noodles consumed in China. Other varieties such as fusilli, lasagne, and penne etc. do not enjoy the same high degree of

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227 Kellogg To Bring Cereal To China Due To Increased Milk Consumption [http://www.huffingtonpost.com/2012/09/24/kellogg-cereal-china_n_1909421.html](http://www.huffingtonpost.com/2012/09/24/kellogg-cereal-china_n_1909421.html)

recognition. One illustrative example of spaghetti’s foremost place in consumer awareness comes from the Chinese website Baidu Baike (the Chinese search engine’s collaboratively built encyclopaedia) with the majority of images on the web entry for pasta on are of spaghetti with other varieties being covered in less detail. Until awareness increases for varieties other than spaghetti consumers may shy away from varieties that are less familiar to them.

**Market Access and Entry**

Processed cereals do not face any market access restrictions and market access is available for all exporters who have completed the Registration of Foreign Exporters of Foodstuffs and are able to comply with the requirements of Chinese import procedures and relevant standards.

**Customs procedures**

Documentation required for import into China includes:

- Commercial Invoice
- Packing List
- Certificate for Registration of Foreign Exporters of Foodstuffs
- Air Waybill, Rail Waybill, or Bill of Lading
- Cargo Manifest
- Insurance Certificate
- Certificate of Analysis
- Buyer Seller Agreement signed by both parties (not required at all ports)
- Certificate of Origin (only if requested by the importer)

The following is a list of documentation required to be prepared by importers:

- Customs Registration – for both importer and exporter registration with Customs
- Customs Import Declaration
- Automatic import License
- Business License of Importer
- Import and Export Business License
- Certificate for Registration of Importer of Foodstuffs
- Commodity Inspection Certificate (if this is not the first shipment)

**Intellectual Property Rights**

The protection of IPR for processed cereal products is especially important given the growth of domestic production in this sector, and the resulting risk of the repackaging of inferior products or the misappropriation of IP that this presents. Monitoring of the distribution chain and the active assistance of distributors in the enforcement of IPR will assist greatly in the early identification of potential infringements and for ensuring that counterfeit produce is not available alongside actual products.
3.10 Bread, Pastry, Cakes, Biscuits and other Bakers' Wares

Market Snapshot

Breads, pastry, cakes, and biscuits have registered strong growth in recent years in China, as the consumption of baked goods is increasingly viewed as part of a leisurely and healthy lifestyle. Affordability, convenience, and perceived health benefits are the primary factors influencing purchasing decisions, particularly amongst China’s growing urban middle class.

The domestic market has seen considerable expansion of consumer awareness and increasing demand. Retail expansion with the number of specialist stores and supermarkets has also increased the availability for bakery products across many markets within China.

Market size and market share

China’s total imports of baked goods stood at over EUR 376 million in 2014. This represents growth of over 16% from 2013 levels, and is almost double the 2011 import figure. In 2014, the EU’s imports of baked goods into China stood at over EUR 100 million, representing growth of 27% over 2013 levels, and almost triple the value of imports into the market in 2011. Denmark maintains the leading market share of EU imports into China, with 32% in 2014, while Italy, Austria, and Germany also command large shares of this burgeoning market.

Regional trading partners also have a significant share of the market with imports from Hong Kong in 2014 valued at EUR 6 million; imports from the Republic of Korea’s totalled EUR 21 million, whilst Japan’s exports to China were valued at just under €10 million. The USA also has a significant and rising level of export value to China albeit at a smaller value than regional trading partners.

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229 ITC Trade Map
230 Eurostat
231 ITC Trade Map
For EU exports to China products such as pizzas and quiches; fruit tarts, currant bread, and panettone; biscuits; and extruded or expanded products performed well all posting positive growth in value between 2011 and 2014.
Growth drivers and trends
The Chinese baked goods market offers huge potential, as consumption levels of such products is currently relatively low. Research suggests that annual per capita consumption of baked goods stands at around 5kg, double the level achieved in 2000\textsuperscript{232}.

Pastries and cakes dominate the baked products market. This trend is expected to continue over the coming years as well-stocked, well-decorated, and usually high-priced dessert shops open across China’s upper-tier cities. Furthermore, unpackaged/artisanal cakes and pastries are also expected to register strong growth over the coming years as producers and retailers of these goods increasingly enter lower-tier cities and rural areas\textsuperscript{233}.

Growth in China’s baked goods market will continue to be maintained by a number of factors, including rising disposable income levels across the country, increasing levels of urbanisation, and a growing demand for convenient snacks. Moreover, the on-going expansion in the number of bakeries, convenience stores, supermarkets and hypermarkets will contribute to growth\textsuperscript{234}.

Geography and major markets
Currently, China’s first tier cities dominate the baked goods market, as higher per capita spending power, greater demand for luxury goods, and greater appetite for increasingly convenience, and health benefits drive demand. In the coming years, however, lower-tier cities and rural markets are expected to increasingly drive growth, particularly in the lower-cost unpackaged segment of the market, as producers and retailers of these goods enter new markets across the country.

In South China, baked sweetbreads and cakes are the most common items that bakeries offer. Traditional specialty products, e.g. ‘wife cake’ (Lao Po Bing, as wedding gifts from the groom’s family to the bride’s family), egg tarts, and almond cookies (Xing Ren Bing) are also popular items. Moreover, western-style pastries have gained increasing popularity in high-end bakeries shops. In this region, the primary retailers of baked products for upper end products are bakery chains, retail outlets, and upscale hotels\textsuperscript{235}.

In East China, consumers prefer sweeter-tasting dishes, and this is reflected in their pastry preferences. For example, pasties with red bean filling, or relatively high sugar content are popular throughout the region. In Western provinces traditional pastries contain fruit and nut pastes and fillings shaping

\textsuperscript{232} Something like a phenomenon: baked products in China
\textsuperscript{233} GAIN Report: The Growth of Chinese Bakeries Expand Opportunities for US Exports,
\textsuperscript{234} Bakery in China http://www.euromonitor.com/bakery-in-china/report
\textsuperscript{235} South China’s bakery industry is booming, but demand for U.S. ingredients depends on price
http://gain.fas.usda.gov/Recent%20GAIN%20Publications/South%20China%20bakery%20industry%20is%20boomi
ng%20but%20demand%20for%20US%20Guangzhou_China%20-%20Peoples%20Republic%20of%2012-6-2009.pdf
consumer preferences towards products with similar flavours or ingredients. Market research factoring in regional preferences is crucial for selecting an appropriate marketing and sales approach in China.

**Distribution**

Distribution of fresh baked goods across the country is hampered by the paucity of adequate cold storage transportation infrastructure, particularly outside the large tier 1 cities. Indeed, distribution networks in China are localised and fragmented, hampering the transportation of baked goods and supplies. There is no nationwide network of trucks, highways, and cold storage facilities to efficiently deliver supplies from the manufacturer or importer.

Artisanal players dominate the Chinese baked goods market, constituting 73% of retail value share in 2014, although their market share has been eroded somewhat in recent years by packaged/industrial players entering the market. Unpackaged/artisanal baked goods are mostly sold through bakeries, which offer frequent innovations in terms of both products and flavours. However, packaged/industrial players are pushing for wider distribution in second-tier cities and rural areas, eroding the dominance of artisanal players.

Many Chinese bakeries are placing increasing emphasis on generating revenue through their online platforms. E-commerce retail channels enable bakeries to reach out to a wider customer base and generate sales, offer a quick and efficient service with low running costs, and maintain longer opening hours. A number of bakeries in tier 1 cities across China are prioritising e-commerce as a revenue earning channel, focusing on offering customers a distinct and unique experience through their online platform.

**Consumer profiles**

China’s growing middle class population view the consumption of baked desserts as a symbol of a leisurely lifestyle, and consumers in this demographic are the main consumers in the baked goods market. Affordability, convenience, and health benefits are the primary driving factors in the baked goods market in an increasingly fast-paced urban environment.

The average consumer of baked goods in China is the middle to high income, well-educated, with the sales of more expensive cakes and desserts being driven by female consumers.

**Sweet vs. savoury**

Whilst Chinese consumers are fond of cakes and sweet pastries, which represent 44% of total baked good sales in the country it is also important to note that consumers do not like overly sweet

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offerings. Typically, Chinese go for lighter-taste sweets with less sugar and fat content. In terms of ingredients, glutinous rice often plays a key role, and traditional Chinese desserts are frequently made with red beans, sesame, dates, or lotus seeds.

Many companies offer products that combine European produce with traditional Chinese fillings as a way to cater to consumer preferences. Examples of such offerings available include red bean paste Danish pastries, sesame seed biscuits, whilst other options have savoury fillings or toppings such as cheese or meat floss.

**Market Access and Entry**

Baked products do not face any market access restrictions and market access is available for all exporters who have completed the Registration of Foreign Exporters of Foodstuffs and are able to comply with the requirements of Chinese import procedures and relevant standards.

**Customs procedures**

Documentation required for import into China includes:

- Commercial Invoice
- Packing List
- Certificate for Registration of Foreign Exporters of Foodstuffs
- Air Waybill, Rail Waybill, or Bill of Lading
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- Insurance Certificate
- Certificate of Analysis
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- Certificate for Registration of Importer of Foodstuffs
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Intellectual Property Rights

As the vast majority of exported baked goods will be shipped in packaging for retail consumption, effective brand and attractive packaging are essential for success in the Chinese market in addition to GI registration and GI product identification.

Branded products are especially important in China where recent domestic food scandals have resulted in the consumer base becoming very sensitive to brand and product reputation. Company and product names should therefore be protected through registration of trademarks, either at the China Trade Mark Office (CTMO) or through the relevant extensions to international registrations. Furthermore, due to Chinese ‘first to file’ rules regarding most IPR registrations, applications should be made well in advance of market entry in order to avoid potential ‘hijacking’ of marks.

It is also worth considering choosing and registering a Chinese language name for products, ideally where the meaning of the characters used complements the product and brand message (rather than straight transliteration). Failure to register a Chinese language mark will likely result in consumers choosing their own name as found by Quaker Oats, now known as ‘Old Man Brand’ in Chinese. Once this consumer chosen name is in use, there is also nothing preventing rival companies registering the Chinese name, which can result in damage to the original brand if sub-standard products are released under its common name.

Packaging is also an important part of retail marketing strategy for baked goods and EU brand owners would be well advised to apply for IPR protection for any distinctive packaging used for their products. Protection of packaging design is most commonly achieved by applying for design patents, however EU companies have also had success enforcing packaging IPR using 3d trade mark registrations as well as through competition law provisions.

Finally, whilst GI products are produced in their specific region, it remains important to protect the exact recipes and processes used in production to prevent product counterfeiting elsewhere. These trade secrets need not be registered to be granted protection in China, but the producer must be able to show that sufficient efforts were made to protect the confidentiality of sensitive material, whether this be through control of documents, separation of production stages or appropriate terms and the requirement of signed Non-Disclosure Agreements (NDAs) as part of employee and partner contracts.
3.11 Confectionary

Market Snapshot

The market for confectionary products in China is set for increases in volume and value with consumers trading up and purchasing higher value products for gifting purposes rather than as snacks. The market shows potential for increased growth of imports, especially for chocolate; however issues such as cold chain storage and fragmented distribution pose challenges for those wishing to expand beyond already established markets.

Market size and market share

The total value of the confectionary market in 2012 stood at over EUR 9.29 billion, with sugar confectionary taking a 72% market share, gum holding a 15% share, and chocolate with a 13% share. The market size of confectionary imports has grown in value by 112% from 2011 to 2014 from EUR 218 million to EUR 462 million. The market share for chocolate and coco product imports has risen from 73% in 2010 to 79% in 2014 with sugar confectionary seeing a corresponding market share decline from 27% to 21% in the same period.

Imports from the EU have seen a higher than category average increase in value of 138% between 2011 and 2014, with the value of imports growing from EUR 95 million to EUR 226 million. This has meant an increase in market share for EU imports from 40% to 49% during this period. In 2014, imports to China from the United States of America for sugar confectionary stood at EUR 4.7 million and for chocolate stood at EUR 18.2 million. It should be noted that many large American confectionary companies have made acquisitions of Chinese companies and producers, granting them a larger share of the domestic market.

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241 Quality key to upping Chinese chocolate consumption, says analyst
http://www.confectionerynews.com/Markets/Quality-key-to-upping-Chinese-chocolate-consumption-says-analyst
242 ITC Trade Map
243 ITC Trade Map
244 Eurostat
245 ITC Trade Map
The main EU trading partners with China for sugar confectionary are Germany, Belgium, Poland, and France. Market leader Germany has seen its market share of EU exports decline between 2011 and 2014 from 41% to 29%, despite increases in the value of trade increasing by 49.6% during this period. Belgium, Poland, and France all saw increases in their market share, with France boasting the largest increase in share from 3.75% of export value in 2011 to 10.64% in 2014.\textsuperscript{246}

\textsuperscript{246} Eurostat
The main EU exporters for chocolate between 2011 and 2014 were Italy, Germany, Belgium, and France. Of these larger states, only Germany saw its share of EU exports increase, from 13.5% to 15%, whilst the other players have seen market share decline. The market for European chocolate has been buoyant with an overall increase in the value in exports, but certain EU Member States have suffered declines in value for certain years.

![Value of chocolate exports to China in millions of Euros](image)

Source: Eurostat

**Growth drivers and trends**

Chocolate is set to drive growth for confectionaries, with the value set to rise faster than the volume of sales. As consumers trade up in their purchases, the value of chocolate is set to increase at 10.1% Compound Annual Growth Rate (CAGR) until 2017, whilst volume is expected to grow at a lower rate of 7.4% CAGR. Although sales of chocolate in China have doubled in the past decade, per-capita consumption in 2014 stood at only 1.2kg annually. This means that consumption is relatively low compared to other markets, indicating that there is still growth potential for the market if consumer trends continue.

Sugar confectionary performed well albeit with market leaders in the low to mid-price-point range losing market share as their rate of growth fell below the category average. Market players will continue

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247 Eurostat
248 China’s Growing Sweet Tooth to Ensure Growth for the Chinese Confectionery Market to 2017
249 A taste of the future: trends that could transform the chocolate industry
to try to move brand positioning to premium products and to make use of distribution networks such as supermarkets and hypermarkets rather than convenience stores.250

An increased focus on healthier lifestyles for middle class and affluent consumers will mean that this sector is likely to make fewer purchases of confectionary however purchases will be of higher value. Trends towards healthier lifestyles may impact the confectionary sector negatively in coming years however the premium sector could see a less pronounced impact.

**Major Markets**
The main markets continue to be the well-developed tier 1 cities where brand awareness and purchasing power are higher.251 Consumers in these markets may be shifting their purchases towards higher quality produce reflecting the trends of healthier lifestyles and trading up. As the number of middle class residents increases, market actors are expanding into lower tiered cities in response to significant demand growth,252 although the products may be low to mid-price point options.

Regional differences have also been noted for consumption and gifting of confectionary for weddings, with half of all purchases being made in the East of China.253 This reflects both the higher number of developed markets in Eastern China as well as different consumer preferences.

**Distribution**
Convenience stores are the largest distribution channel for confectionary, although market share has been declining as it loses ground to supermarkets and hypermarkets, with specialty stores also registering a declining overall share.254 This reflects both the wider trends within the retail sector as well as the changing patterns of consumption away from snacks and towards higher quality gifting products. The value of confectionary retail is predicted to enjoy an increase in value of 50% from 2013 to 2018255, indicating the potential for growth for EU exporters who can build effective relationships with distributors.

Cold chain storage remains an obstacle for imported produce wishing to expand its distribution beyond well-developed entry point markets such as Shanghai and Beijing.256 The risk of heat damage to products is present in various stages of the supply chain, necessitating close management of the supply chain and investment in better cold chain storage.

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**Consumer profiles**

Confectionary products are generally more popular with younger consumers who have had increased exposure to Western products and lifestyle. Health conscious consumers from higher income brackets will still make purchases, although they will be less likely to make impulse purchases of snacks and low to mid-price-point options.²⁵⁷

As there is not nationwide market penetration for confectionary products, consumers in different regions have different patterns of consumption. More sophisticated consumers are more likely to purchase larger gift boxes or sets of confectionary, whilst those consumers in less developed markets will be more likely to purchase single serving or smaller products.²⁵⁸

**Seasonal sales**

Sales have traditionally been seasonal, in that confectionary products perform better during the winter rather than the summer. This is due in part to the belief that confectionary products are classified as a “hot” product according to Chinese pharmacology, and they should therefore be consumed during colder weather rather than during the summer.²⁵⁹

**Wedding confectionary**

The giving of high quality chocolate and sugar confectionaries at weddings is increasingly prevalent and, as it is part of China’s gifting culture, products in the high price point range and with a good reputation can do well in this market niche.²⁶⁰ Manufacturers have sought to expand their business by tapping into this market through upgrading their packaging and allowing for more personalised options for products.²⁶¹

Given the booming value of the wedding market in China, being able to capitalise on this niche will be important for products marketing themselves as high quality rather than as snacks or low to mid-price-point options. High quality packaging and a high price are important aspects for giving face to both the recipient and the giver of the gift.

Market Access and Entry
Chocolate and sugar confectionary products are not subject to any market access restrictions, and market access is available for all exporters who have completed the Registration of Foreign Exporters of Foodstuffs and are able to comply with the requirements of Chinese import procedures and relevant standards.

Customs procedures
Documentation required for import into China includes:

- Commercial Invoice
- Packing List
- Certificate for Registration of Foreign Exporters of Foodstuffs
- Air Waybill, Rail Waybill, or Bill of Lading
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- Business License of Importer
- Import and Export Business License
- Certificate for Registration of Importer of Foodstuffs
- Commodity Inspection Certificate (if this is not the first shipment)

SPS measures
Previously Chinese standards had set maximum levels for copper lower levels than that used in international standards at 15 mg per kilogram. This had caused some disruption for the trade of chocolates and chocolate based products; however in December 2014 China changed its standard for copper in chocolate, cocoa butter and chocolate products. The Chinese requirements now reflect international standard and there are no further disruptions to trade.262

262 EU market access flash note: China ends trade hurdles for European chocolate exports
Intellectual Property Rights

Given the high value of confectionary and a large number of well-established domestic companies it is important to protect your trademarks and other forms of intellectual property. This can ensure that your product can be distinguished from the competition and is protected from infringing activities that may mislead end consumers.

The packaging of produce is especially important given the role of confectionaries for gifting. Where specialised packaging has been designed to target this lucrative market, relevant elements of the design should be protected. Where these designs have been created or the packaging manufactured in collaboration with the service providers in China IP protection must be incorporated into the relevant service contracts or business agreements.

Case Study: Ferrero Rocher

Ferrero Rocher entered the Chinese market with its signature range of chocolates in 1984 utilising the Chinese name of 金莎 registering the trademark for the Chinese name in Taiwan in 1990 and Hong Kong in 1993. Importantly the Chinese name was not registered in the People’s Republic of China as a trademark.

In 1990 Montresor (Zhangjiagang) Food Co. Ltd. Started using 金莎 for its “Tresor Dore” range of products and packaging closely resembled that used by Ferrero Rocher. In 2003 Ferrero brought a case in the Tianjin Intermediate Court, the case was rejected on the basis that the “Tresor Dore” range was well known and better established within China than “Ferrero Rocher”.

This ruling was overturned during the appeal at the Tianjin High Court which ordered that production be stopped and that the infringing packaging be modified. In 2008 the Beijing Supreme Court upheld this ruling that the packaging and appearance were similar to Ferrero Rocher’s products and that this would mislead customers.

Although Ferrero Rocher eventually prevailed had they registered their trademarks in the PRC at an earlier date they could potentially prevented competitors from utilising similar packaging as well as reducing the time and costs of litigation once their intellectual property had been infringed.

Sources: China’s Supreme Court sides with Foreign Owner of Famous Consumer Product, despite lack of Trademark Protection http://www.frostbrowntodd.com/resources-06-23-2008.htm
“Ferrero” judicial case http://picozzimorigi.cn/main/reports.php?id=10
Take Away Tips:

- Register your intellectual property in China at the earliest opportunity
- Monitor the market for products utilising similar packaging or trademarks as your product
- Ex officio enforcement from the relevant Chinese authorities is faster and less costly than litigation in the People’s Courts
- Registration via the World Intellectual Property Organisation (WIPO) and unfair competition laws can help your case
3.12 Honey

Market Snapshot
China is both a large producer and consumer of honey, consuming the majority of the honey it produces but also exporting to Europe, Japan, and the United States. Whilst domestic produce dominates the market, imported honey is available through larger retail channels and the value of imports has shown impressive growth in recent years.

There are still issues of counterfeit and unsafe produce on the market, fragmented production, and a lack of a well-developed distribution and processing facilities. Accordingly, the domestic market is not consolidated, and there can be large fluctuations in production volumes, quality, and price.

Market size and market share
China accounts for around 25% of global production, and the domestic market consumes roughly 60% of the country’s production. Whilst domestic honey takes the largest share of the market, there has been growth in the value of imported honey into China. New Zealand has seen its trade of natural honey grow in value from EUR 5,913,000 in 2012 to EUR 18,894,000 in 2014, making it a significant trading partner with China. Australia and the United States have more modest trade with China, with the value of trade at EUR 3,461,000 and EUR 634,000 respectively.

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264 ITC calculations based on UN COMTRADE statistics until January, 2014.
Exports from the EU 28 have been growing in value year on year, totalling EUR 6,904,324.00 in 2014, constituting a 270% increase in trade from 2011. The main exporting countries by value of trade were Germany, France, the United Kingdom, and Spain who collectively accounted for 76% of EU exports to China. Other EU states have seen impressive growth, with Austria improving their share of EU exports from 0.6% in 2011 to 7.3% in 2014.265

### Growth drivers and trends

The growth of honey consumption has been driven due to increased awareness of potential health benefits266 and, as disposable incomes rise, consumers are motivated to trade up for healthier products. Elderly consumers are an important consumer group for honey and, as China has an ageing population, the market has significant growth potential. Declines in Chinese production due to increased pressure on land and rising costs of other inputs for producers has led to a corresponding drop in the number of beekeepers, colonies, and honey production. With development trends set to increase pressure for some agricultural sectors in China there is likely to be more space for imports in the market to meet domestic demand.

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265 Eurostat data
Geography and major markets
Qinghai is the major honey producing region in China. Competition from competitively priced domestic produce will pose a challenge for imported honey. The main entry point for imported honey are tier 1 cities such as Beijing, Shanghai and Guangzhou, where better infrastructure, distribution and more developed patterns of demand aid the establishment of market presence and brand building.

Lower tiered cities are potential growth markets. However, increased challenges for distribution and marketing development in these markets mean they are generally more suitable for established brands.

Retail Channels
Imported honey is available in many large supermarkets as well as in specialist and high end lifestyle stores. Retailing via department stores and supermarkets are good channels to utilise as these retailers can influence buying demands and build brand awareness. Whilst e-commerce is a growing trend in China, it is not widely utilised by the main demographic for imported honey, older consumers, and so growth via online sales may be slower than for other foods and beverages.

Consumer profiles
Consumers of honey are largely motivated by an increased focus on healthier lifestyles meaning that target demographics will be middle class and affluent consumers seeking to improve their or their families’ nutritional intake. Elderly consumers are also an important demographic as the gifting of honey is seen as a healthier option than products such as alcohol and remains popular especially during the holiday seasons.

In addition to elderly and health conscious consumers, demand for honey is high from food and cosmetics manufacturers, bakeries, health food producers, and the food service industry.

Perception of honey
Historically honey has been viewed in a positive light in China, with gifting done as early as the Tang Dynasty (618-907 AD) and a monograph on herbal medicine written in 1578 during the Ming Dynasty extolling the health benefits of honey consumption. Positive connotations and favourable perception

267 Honey and Bee Products Market in China: Business Report 2015

268 China Info Sheet: Honey by New Zealand Trade & Enterprise
https://www.google.com.hk/url?sa=t&rct=j&q=&esrc=s&source=web&cd=1&cad=rja&uact=8&ved=0CB0QFjAA&url=http%3a%2f%2fwww%2ejas%2eorg%2epl%2fpdf%2f46%3ffilename%3djas10_1_2002%2epdf&ei=MZj-VMv5LcjooATJmYCYBg&usg=AFQjCNEVygQT0C1WrfBvCIQNjNt5bB28uw

269 China Info Sheet: Honey by New Zealand Trade & Enterprise
https://www.google.com.hk/url?sa=t&rct=j&q=&esrc=s&source=web&cd=1&cad=rja&uact=8&ved=0CB0QFjAA&url=http%3a%2f%2fwww%2ejas%2eorg%2epl%2fpdf%2f46%3ffilename%3djas10_1_2002%2epdf&ei=MZj-VMv5LcjooATJmYCYBg&usg=AFQjCNEVygQT0C1WrfBvCIQNjNt5bB28uw

270 Honey and Bee Products Market in China: Business Report 2015

of honey compared to other sweeteners offers a good starting point for marketing and sales strategies for those wishing to connect with Chinese consumers.

**Gifting**

Honey is seen as a suitable product to be gifted during the holiday seasons to relatives or friends and sales in the run up to Chinese New Year will increase. Packaging and presentation are of greater importance for gifted produce than for purchase made for individual consumption, increasing the need for experienced assistance with marketing approaches.

**Customs procedures**

Documentation required for import into China includes:

- Commercial Invoice
- Packing List
- Certificate for Registration of Foreign Exporters of Foodstuffs
- Air Waybill, Rail Waybill, or Bill of Lading
- Cargo Manifest
- Insurance Certificate
- Certificate of Analysis
- Buyer Seller Agreement signed by both parties (not required at all ports)
- Certificate of Origin (only if requested by the importer)
- Veterinary Health Certificate for Animal Products

The following is a list of documentation required to be prepared by importers:

- Customs Registration – for both importer and exporter registration with Customs
- Customs Import Declaration
- Automatic import License
- Business License of Importer
- Import and Export Business License
- Certificate for Registration of Importer of Foodstuffs
- Commodity Inspection Certificate (if this is not the first shipment)
- Permit to Import Live Animals and Plants Subject to Quarantine

**Food Safety**

Careful market surveillance is required to prevent damage to brands due to counterfeits and unsafe products. Food safety issues due to the presence of pesticides, antibiotics and heavy metal contamination have had an adverse effect on domestic brands, whilst in some localities the amount of fake product has caused public mistrust and has damaged sales. Ensuring that your intellectual property rights have a suitable level of protection and that all stages of the distribution chain are secured.

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carefully monitored can ensure that the risk of damage to your brand is minimised and that consumers are not misled by poor quality products.

**Intellectual Property Rights**

A quality-driven product, brand and product identification are crucial to success in China, where the local consumer base is very sensitive to brand identity and product reputation. In order to maintain brand integrity and build trust amongst consumers it is essential therefore to register company and product trademarks with the China Trade Mark Office (CTMO) or make the relevant extensions to international registrations in addition to the relevant GI registrations. It is advised that applications are made well in advance of market entry as China’s ‘first to file’ system can leave brands vulnerable to trademark ‘hijacking’ if applications are not made in a timely fashion.

It is also worth considering choosing and registering a Chinese language name for products, ideally where the meaning of the characters used complements the product and brand message (rather than straight transliteration). Failing to register a Chinese language mark will likely result in consumers choosing their own name, which can result in damage to the original brand if sub-standard products are released under the new name.

As a regularly gifted item in China, packaging is an important part of retail marketing strategy. As such EU brand owners would be well advised to apply for IPR protection for any distinctive packaging used for their products. Protection of packaging design is most commonly achieved by applying for design patents, however EU companies have also had success enforcing packaging IPR using 3d trade mark registrations as well as through competition law provisions.
3.13 Live Plants

Market Snapshot
The market for live plants in China has been demonstrating robust year on year growth driven by increased individual consumer expenditure. Whilst purchases for traditional festivals are perennially popular, the increasing awareness of Western celebrations such as Valentine’s Day and Christmas are offering new opportunities for market players. Online retail is opening new customer bases for imported live plants; however, important challenges remain due to fragmented distribution and cold chain capacity issues.

Market size and market share
In 2012 the total value of imported live plants, bulbs, cut flowers and ornamental foliage stood at over EUR 106 million, growing to over EUR 130 million in 2013\(^{274}\) posting further growth, albeit at a slower pace, to over EUR 143 million in 2014.\(^{275}\) During the same period the total value for imports from the EU increased from EUR 68 million to EUR 91 million,\(^{276}\) translating to a stable market share of imports of approximately 64% in 2014. Other main trading partners with Mainland China include Thailand, Taiwan, the United States, and South Africa.

The Netherlands dominates the trade of bulbs and tubers as well as for cut flowers with over 99% market shares of EU exports to China for these products as well as enjoying a 72% share of exports of live plants and a 48% share of foliage and other parts of plants for ornamental purposes. Although cut flowers occupy the smallest share of export value they have had the fastest growth in recent years with average year on year growth of 182% in value between 2011 and 2014.\(^{277}\)

\(^{274}\) China National Statistics Yearbook 2014: Value of Imports and Exports of Goods by HS Section and Division
\(^{275}\) ITC Trade Map
\(^{276}\) Eurostat
\(^{277}\) Eurostat trade data for products categorized under HS 0601, 0602, 0603, and 0604
Growth drivers and trends

Although government offices and businesses rank first in terms of demand for flowers and plants, they have ceased to be as important in driving growth which is now driven by increased expenditure of individual consumers. The government crackdown on conspicuous consumption and corruption since mid-2013 impacted demand from state owned enterprises and government departments. Demand from individual consumers, however, has shown a steady increase in recent years. This is particularly true in the prosperous Eastern coastal cities with the primary motivation for the purchasing being for festivals, home use, or gifts for friends and relatives.

The increasing popularity among young consumers of giving cut flowers during Valentine’s and the growth of e-commerce platforms to support this trade point to continued growth for certain varieties. The increase in exposure to imported varieties may also act as a catalyst for higher future demand. Another driver for growth could come from increases in home and garden improvement and expenditure also has the potential to increase demand for imported live plants from individual consumers. Increased disposable income, leisure time, and concerns over air quality and healthy living are all factors driving the overall sector.

Source: Eurostat and ITC Trade Map

278 http://www.ft.com/intl/cms/s/0/825c82a2-825a-5ba-11e2-9b77-00144feabdc0.html#axzz3UhZs9AD5
279 Survey on Flower Retail in China http://nabsokunming.nlmission.org/binaries/content/assets/postenweb/c/china/kunming/import/reports/survey-flower-retail-in-china
**Geography and major markets**

The main markets for ornamental plants and cut flowers are tier 1 cities in China, although preferences are not uniform. A survey of consumers indicated the differing preferences across China for: lawn grass, seeds, and seedlings in Guangzhou; edible and medical flowers, flowers for industrial use and other purposes, seed bulbs in Chongqing; seeds, seedlings and hydroponic flowers in Kunming; ornamental seedlings in Shanghai; and a preference for lawn grass, seed bulbs, seedlings in Nanjing.\(^{281}\)

Although demand for certain flowers is more uniform during festivals and holidays, for example roses during Valentine’s Day, market research on consumer preferences should not discount variations in taste at a regional or city by city basis.

**Distribution**

Domestically produced cut flowers are primarily sourced from auction markets and wholesalers in Kunming and Guangzhou which are supplied by local production bases. Potted flowers and ornamental plants are also supplied from Guangzhou as well as from Fujian and Beijing. The majority of fresh cut flowers are transported by air from the large production and wholesale bases; however, there are significant constraints in terms of cold chain storage forcing many physical and online retailers to have limited geographical coverage for their distribution networks.\(^{282}\)

Many domestic flower producers are run by small companies or families, limiting their growth potential. These producers are unlikely to have a strong online presence, if any, and also lack the ability to utilise professional marketing assistance or to invest in improving supply chain logistics.\(^{283}\)

Wholesale markets and auctions have the largest volume of sales however profit margins may be higher for sales direct to larger customers such as Hotel chains, and large businesses. For end consumers specialist shops and wholesale markets have traditionally been utilised, although the growth of e-commerce is offering new opportunities.

**Online retail**

Online flower sales in 2012 were valued at about CNY 500 million (over EUR 60 million)\(^{284}\) with the sector growing year on year. E-commerce is also becoming increasingly sophisticated in allowing consumers to personalise their international orders. In 2014, Taobao and Tmall partnered with the Netherlands consulate general to allow online shoppers to pre-order Dutch tulips, which are expected to be plucked on Feb 10 in the Netherlands and delivered to customers’ doorsteps on Feb 14.\(^{285}\) High end

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\(^{281}\) Survey on Flower Retail in China  

\(^{282}\) The long-distance kiss that put flowers on Net  

\(^{283}\) Market analysis: Chinese flowers  

\(^{284}\) The long-distance kiss that put flowers on Net  

\(^{285}\) A holiday that’s red-hot for lovers and retailers  
e-commerce retailers have also seen demand surge to the extent that they are now partnering with delivery companies such as FedEx.\(^{286}\)

Whilst the growth of e-commerce presents new opportunities, the market is not consolidated with around 3,000 online retailers of fresh flowers, many of which being small in capacity and localised in their market coverage.\(^{287}\) Many florists also lack professional training and so ensuring that the product that a customer receives products matching online descriptions may be a challenge if e-commerce platforms rely on local florists to deliver merchandise to the end consumer.

**Consumer profiles**

Purchases of ornamental plants are done by most consumer groups with purchases made in line with major festivals. Most consumers will buy flowers 2 to 5 times a year, with end consumer purchases done mostly at specialist flower shops and flower markets or from street vendors during festivals.\(^{288}\)

For cut flowers, rather than potted plants or other ornamental plants, young professional males are a key consumer group. Research has indicated that the main customers for flowers bought online are males aged between 20 and 39 who will send flowers to their partners. About half of these customers were IT workers residing in large cities such as Beijing, Shanghai, or Shenzhen. Flowers were predominantly sent to recipients in other cities,\(^{289}\) indicating a preference for personal delivery for recipients in the same city.

**Festivals and flower sales**

Colour associations are important within China and flowers of certain colours and varieties will see sales spike during certain festivals. Red flowers are popular for Valentine’s Day, Qixi 七夕 (Chinese Valentine’s Day), and Christmas. Pink flowers are popular for Teachers Day, whilst yellow flowers are popular for Tomb Sweeping Day.

Valentine’s Day and its Chinese equivalent have been increasing in popularity especially for the younger generation and mark the main occasion for purchasing cut flowers, whilst the main occasion for purchasing potted ornamental plants and flowers is Chinese New Year. For weddings, large amounts of high quality flowers will be purchased for both the ceremony and the reception with colours such as pink, champagne, white, and red being the most popular choices.\(^{290}\)

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\(^{288}\) Survey on Flower Retail in China [http://nabsokunming.nlmission.org/binaries/content/assets/postenweb/c/china/kunming/import/reports/survey-flower-retail-in-china](http://nabsokunming.nlmission.org/binaries/content/assets/postenweb/c/china/kunming/import/reports/survey-flower-retail-in-china)


\(^{290}\) Survey on Flower Retail in China [http://nabsokunming.nlmission.org/binaries/content/assets/postenweb/c/china/kunming/import/reports/survey-flower-retail-in-china](http://nabsokunming.nlmission.org/binaries/content/assets/postenweb/c/china/kunming/import/reports/survey-flower-retail-in-china)
Customs and SPS requirements

The customs requirements vary according to the intended purpose of the plants, for example different requirements are in place for seeds and products for sowing than for other products such as cut flowers.

Customs procedures

Documentation required for import into China includes:

- Commercial Invoice
- Packing List
- Certificate for Registration of Foreign Exporters of Foodstuffs
- Air Waybill, Rail Waybill, or Bill of Lading
- Cargo Manifest
- Insurance Certificate
- Certificate of Analysis
- Buyer Seller Agreement signed by both parties (not required at all ports)
- Certificate of Origin (only if requested by the importer)
- Phytosanitary Certificate

The following is a list of documentation required to be prepared by importers:

- Customs Registration – for both importer and exporter registration with Customs
- Customs Import Declaration
- Automatic import License
- Business License of Importer
- Import and Export Business License
- Certificate for Registration of Importer of Foodstuffs
- Commodity Inspection Certificate (if this is not the first shipment)
- Permit to Import Live Animals and Plants Subject to Quarantine

Seeds and Products for Sowing:

Seeds and products that are intended for sowing require the issuance of a Seed Business License for Import and Export and the Examination and Approval of Crop Seeds or Seedlings for Import and Export obtained from the General Office for Administrative Examination and Approval of the Ministry of Agriculture.

Products intended for sowing may not be required to have a Permit to Import Live Animals and Plants Subject to Quarantine.

Endangered Species:

In line with obligations under the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) certain products that of endangered species face additional import requirements. Imports of orchid tubers and other endangered species will require a Permit to Import Endangered Species and Products Thereof. This permit should be obtained by the importer from the State Forestry Administration of China.
Aloe:
The import of aloe, other than seedlings, requires Registration of Medicines, and an Inspection Certificate for Medicines both applied for by the importer with the local department of the China Food and Drug Administration (CFDA). The exporter will have to provide a certificate for a pharmaceutical product issued by a laboratory in the country of origin.

Intellectual Property Rights
Ensuring the timely registration of plant variety rights (PVR) in China will enable producers to protect unique varieties from the unlicensed commercial use or propagation within the PRC. As the majority of sales of live plants is done via wholesale markets and small scale street vendors monitoring the market for potential infringement of IP violations can be a challenge. Working closely with specialist distributors and retailers and close monitoring of and collaboration with all elements of the supply chain can assist in enforcement.

The registration of PVR prevents the production of the protected plant variety by asexual means without permission of the rights holder, or the independent cultivation of a plant that is the same as the protected plant variety. Ensuring that there is an adequate level of protection for any related IP, such as specific packaging, will also help ensure that products can remain distinguishable from those of competitors.

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291 english.forestry.gov.cn/
4. Directory of Trade Support Projects, Organisations, and Service Providers

There are a variety of services available, both within the EU and in China, for producers wishing to develop their business in China. These service providers include EU funded projects, services provided by Member States and their embassies, and other organisations and service providers.

Section 4.1 contains the project profiles for EU funded initiatives operating in China.

Section 4.2 contains the contact information for Member State embassies within China.

Section 4.3 contains a listing of service providers including some information on the services available.

Section 4.4 provides a calendar of exhibitions, trade shows, and other events to be held in China in 2015.
4.1 European Union Organisations

Several EU funded, or co-funded, projects within China offer a range of business facilitation services and information providing important insights into the Chinese market. Depending on your company profile these services can be free or fee based; and are available for companies from any EU Member State.

The EU SME Centre is a European Union funded initiative helping SMEs get ready to do business in China. Located in Beijing, the Centre provides practical information, confidential advice, and training in the areas of business development, legal issues, standards and HR to facilitate market access for European SMEs. The Centre also acts as a platform to facilitate coordination amongst Member State and European public and private sector service providers to SMEs.

The EU SME Centre is managed by six implementing partners who through their knowledge and experience of the China market guide the strategic development and management of the Centre. the Benelux Chamber of Commerce in China, the China-Britain Business Council, the China-Italy Chamber of Commerce, Eurochambres, the European Union Chamber of Commerce in China, and the French Chamber of Commerce in China.

Contact:
Room 910, Sunflower Tower, No. 37 Maizidian West Street
Chaoyang District 100125, Beijing, P.R.C.
Telephone: +86 10 85275300
Email: info@eusmecentre.org.cn

The China IPR SME Helpdesk supports European Union (EU) small and medium sized enterprises (SMEs) to both protect and enforce their Intellectual Property Rights (IPR) in or relating to China, through the provision of free information and services. These take the form of jargon-free, first-line, confidential advice on intellectual property and related issues, plus training, materials and online resources.

Individual SMEs and SME intermediaries can submit IPR enquiries directly to the Helpdesk via phone, email or in person, getting access to a panel of experts to receive free and confidential first-line advice. The multi-lingual online portal provides easy access for all EU SMEs to Helpdesk information and services, including Helpdesk guides, E-learning modules, event information, and live webinars. The China IPR SME Helpdesk is jointly implemented by DEVELOPMENT Solutions, the European Union Chamber of Commerce in China and European Business Network (EBN).

Contact:
Room 2480, Beijing Sunflower Tower
No.37 Maizidian Street
Chaoyang District, Beijing 100125, PR China
The European Union Chamber of Commerce in China was founded in 2000 by 51 member companies that shared a goal of establishing a common voice for the various business sectors of the European Union and European businesses operating in China. It is a members-driven, non-profit, fee-based organisation with a core structure of 43 Working Groups and Fora representing European business in China.

The European Chamber now has more than 1,800 members in 7 chapters operating in 10 cities: Beijing, Chengdu, Chongqing, Nanjing, South China (Guangzhou and Shenzhen), Shanghai, Shenyang and Tianjin. Each chapter is managed at the local level by local boards reporting directly to the Executive Committee.

The Chamber is recognised by the European Commission and the Chinese Authorities as the official voice of European business in China. It is recognised as a Foreign Chamber of Commerce with the Ministry of Commerce and China Council for the Promotion of International Trade. The European Chamber is part of the growing network of European Business Organisations (EBO). This network connects European business associations and chambers of commerce from 20 non-EU countries around the world.

Contact:
Beijing Lufthansa Center, Office C412, No. 50 Liangmaqiao Road,
Beijing, 100125, P.R. China
Telephone: +86 (10) 6462 2066
Fax: +86 (10) 6462 2067
Email: euccc@europeanchamber.com.cn
4.2 Directory of EU Member State Embassies

Individual Member States offer commercial support and services for companies from their country of origin. Make enquiries to see what services are available and if there are any upcoming events you can participate in.

<table>
<thead>
<tr>
<th>EU Member State</th>
<th>Address</th>
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<tbody>
<tr>
<td>Austria</td>
<td>Jian guomenwai Xishui Nanjie 5 Beijing 100600 China</td>
<td><a href="http://www.bmeia.gv.at/botschaft/peking.html">http://www.bmeia.gv.at/botschaft/peking.html</a></td>
<td>Tel: +86 10 6532 2061 Tel: +86 10 6532 9869</td>
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<tr>
<td>Belgium</td>
<td>6, Sanlitun Lu Beijing 100600 China</td>
<td><a href="http://www.diplomatie.be/BEIJING/">http://www.diplomatie.be/BEIJING/</a></td>
<td>Tel: +86 10 6532 1736 or 6532 1737 Fax: +86 10 6532 5097</td>
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<tr>
<td>Bulgaria</td>
<td>Xishui Beijie 4 Beijing 10060 China</td>
<td><a href="http://www.mfa.bg/embassies/china">http://www.mfa.bg/embassies/china</a></td>
<td>Tel: +86 10 6532 1946 Fax: +86 10 6532 1916 Email: <a href="mailto:embassy.beijing@mfa.bg">embassy.beijing@mfa.bg</a></td>
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<td>Croatia</td>
<td>Sanlitun Diplomatic Office Building 2-7-2Beijing 100600 China</td>
<td><a href="http://cn.mvep.hr/">http://cn.mvep.hr/</a></td>
<td>Tel: +86 10 6532 6241 Fax: +86 10 6532 6257 Email: <a href="mailto:croemb.beijing@mvep.hr">croemb.beijing@mvep.hr</a></td>
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<tr>
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<td>2-13-2, Tayuan Diplomatic Office Building 14 Liangmahe Nanlu Chaoyang District, Beijing 100600, China</td>
<td><a href="http://www.mfa.gov.cy/mfa/embassies/embassy_beijing.nsf/DMLIndex_en/DMLindex_en">http://www.mfa.gov.cy/mfa/embassies/embassy_beijing.nsf/DMLIndex_en/DMLindex_en</a></td>
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<tr>
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<td>No. 1 Sanlitun Dongwujie, Chaoyang District, Beijing 100600, China</td>
<td><a href="http://kina.um.dk/">http://kina.um.dk/</a></td>
<td>Tel: +86 10 8532 9900 Fax: +86 10 8532 9999 Email: <a href="mailto:bjsamb@um.dk">bjsamb@um.dk</a></td>
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<td>Estonia</td>
<td>No. 1, Liangmaqiao Beixiaojie, Chaoyang District, Beijing 100600 China</td>
<td><a href="http://www.peking.vm.ee/">http://www.peking.vm.ee/</a></td>
<td>Tel: +86 10 85316700 Fax: +86 10 85316701 Email: <a href="mailto:embassy.beijing@mfa.ee">embassy.beijing@mfa.ee</a> <a href="mailto:commerce.beijing@mfa.ee">commerce.beijing@mfa.ee</a></td>
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<tr>
<td>France</td>
<td>Faguo Zhuhua Dashiguan 60, Tianze Lu Beijing 100600 China</td>
<td><a href="http://www.ambafrance-cn.org/">http://www.ambafrance-cn.org/</a></td>
<td>+86 10 85 31 20 00</td>
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<tr>
<td>Germany</td>
<td>No. 17, Dongzhimenwai Dajie, Chaoyang District Beijing 100600 China</td>
<td><a href="http://www.china.diplo.de/Vertretung/china/de/Startseite.html">http://www.china.diplo.de/Vertretung/china/de/Startseite.html</a></td>
<td>+86 10 8532 9000</td>
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<td>+86 10 8531 6200</td>
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<td>2, Sanlitun Donger Jie Beijing 100600 China</td>
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<td>+86 10 8532.7600</td>
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<tr>
<td>Latvia</td>
<td>Unit 71, Green Land Garden No 1A, Green Land Road Chaoyang District Beijing 100016 China</td>
<td><a href="http://www.latvianembassy.org.cn/e">http://www.latvianembassy.org.cn/e</a></td>
<td>+86.10.6433.3863</td>
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<td>Lithuania</td>
<td>A-18, King's Garden Villa, 18 Xiaoyun Road, Chaoyang District, 100125 Beijing China</td>
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<td>+86 10 845 185 20</td>
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<tr>
<td>Luxembourg</td>
<td>Unit 1701, Tower B, Pacific Century Place, 2A Gongti Beilu, Chaoyang District, Beijing 100027 China</td>
<td><a href="http://pekin.mae.lu/en">http://pekin.mae.lu/en</a></td>
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<td>Netherlands</td>
<td>Liangmahe South Road #4 Chaoyang District Beijing 100600 China</td>
<td><a href="http://china.nlembassy.org">http://china.nlembassy.org</a></td>
<td>Tel: +86 10 8532 0200 Fax: +86 10 8532 0300 Email: <a href="mailto:pek@minbuza.nl">pek@minbuza.nl</a></td>
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<td>1, Ritan Rd. Beijing 100600 China</td>
<td><a href="http://pekin.ms.gov.pl/en">http://pekin.ms.gov.pl/en</a></td>
<td>Tel: +86 10 653 21 235 ext. 110 Fax: +86 10 653 21 745 Email: <a href="mailto:pekin.amb.wk@msz.gov.pl">pekin.amb.wk@msz.gov.pl</a></td>
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<td>Sanlitun Dongwu Jie, n°8, Beijing 100600 China</td>
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<td>Romania</td>
<td>2, Ritan East Rd. Chaoyang District Beijing 100600 China</td>
<td><a href="http://beijing.mae.ro/en">http://beijing.mae.ro/en</a></td>
<td>Tel: +86 10 6532 3442 +86 10 6532 3315 +86 10 6532 5417 Fax: +86 10 6532 5728 Email: <a href="mailto:ambasada@roamb.link263.com">ambasada@roamb.link263.com</a></td>
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<td><a href="http://www.mzv.sk/peking">http://www.mzv.sk/peking</a></td>
<td>Tel.: +86 1065321530, +86 1065321531, +86 1065321537 Fax: +86 1065324814 Email: <a href="mailto:emb.beijing@mzv.sk">emb.beijing@mzv.sk</a></td>
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<tr>
<td>Slovenia</td>
<td>King's Garden Villas, No. 57, Block F, 18 Xiaoyun Road Chaoyang District Beijing 100125 China</td>
<td><a href="http://peking.veleposlanistvo.si/index.php?id=40&amp;L=1">http://peking.veleposlanistvo.si/index.php?id=40&amp;L=1</a></td>
<td>Tel: +86 10 6468 1030 +86 10 6468 1154, Fax: +86 10 6468 1040 Email: <a href="mailto:vpe@gov.si">vpe@gov.si</a></td>
</tr>
<tr>
<td>Spain</td>
<td>Sanlitun Lu, 9 Chaoyang District 100600 Beijing China</td>
<td><a href="http://www.exteriores.gob.es/Embajadas/PEKIN/en/Pages/inicio.aspx">http://www.exteriores.gob.es/Embajadas/PEKIN/en/Pages/inicio.aspx</a></td>
<td>Tel: +86 10 6532 3629 Fax: +86 10 6532 3401 Email: <a href="mailto:emb.pekin@maec.es">emb.pekin@maec.es</a></td>
</tr>
<tr>
<td>Sweden</td>
<td>3, Dongzhimenwai Dajie Sanlitun Chaoyang District Beijing 100600, China</td>
<td><a href="http://www.swedenabroad.com/peking">http://www.swedenabroad.com/peking</a></td>
<td>Tel: +86 10 6532 9790 Fax: +86 10 6532 5008 Email: <a href="mailto:ambassaden.peking@gov.se">ambassaden.peking@gov.se</a></td>
</tr>
</tbody>
</table>
4.3 Other organisations and service providers

Other service providers that offer business facilitation and assistance for companies are often provided on a fee paying basis. These service providers often work with, or are part of, the commercial sections of their respective governments and embassies.

<table>
<thead>
<tr>
<th>Service provider</th>
<th>Website</th>
<th>Address</th>
<th>Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Services for Austrian Companies</strong></td>
<td></td>
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<tr>
<td>Advantage Austria</td>
<td><a href="http://www.advantageaustria.org/cn/Oesterreich-in-China.en.html">http://www.advantageaustria.org/cn/Oesterreich-in-China.en.html</a></td>
<td>ADVANTAGE AUSTRIA Beijing Austrian Embassy - Commercial Section Suite 2280 Beijing Sunflower Tower No. 37 Maizidian Street, Chaoyang District 100125 Beijing, China</td>
<td>Tel: +86 10 8527 5050 Fax: +86 10 8527 5049 Email: <a href="mailto:peking@advantageaustria.org">peking@advantageaustria.org</a></td>
</tr>
<tr>
<td>Austrian Economic Chambers</td>
<td><a href="https://www.wko.at/Content.Node/wir/Austrian_Economic_Chambers_Home.html">https://www.wko.at/Content.Node/wir/Austrian_Economic_Chambers_Home.html</a></td>
<td>Wiedner Hauptstraße 63 1045 Vienna, Austria</td>
<td>Tel: +43 5 90 900 Fax: +43 5 90 900 250 Email: <a href="mailto:office@wko.at">office@wko.at</a></td>
</tr>
<tr>
<td>Oesterreichische Kontrollbank Aktiengesellschaft (OeKB)</td>
<td><a href="http://www.oekb.at/">http://www.oekb.at/</a></td>
<td>Oesterreichische Kontrollbank Aktiengesellschaft Am Hof 4; Strauchgasse 3 1011 Vienna, Austria</td>
<td>Tel: +43 1 53127-2859 Fax: +43 1 53127-5698 Email: <a href="mailto:corporate.communications@oekb.at">corporate.communications@oekb.at</a></td>
</tr>
<tr>
<td><strong>Services for Belgian Companies</strong></td>
<td></td>
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<tr>
<td>Brussels Invest &amp; Export</td>
<td><a href="http://www.invest-export.irisnet.be/en/nos-services">http://www.invest-export.irisnet.be/en/nos-services</a></td>
<td>Brussels Invest &amp; Export Foreign trade and foreign investments service of the Brussels Regional Public Service Avenue Louise 500/4 1050 Brussels, Belgium</td>
<td>Tel: +32 (0)2 800 40 00 Fax: +32 (0)2 800 40 01 Email: <a href="mailto:info@brusselsinvestexport.be">info@brusselsinvestexport.be</a></td>
</tr>
<tr>
<td>Service provider</td>
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<td>Delcredere</td>
<td>Ducroire</td>
<td><a href="http://www.delcredereducroire.be/en/about-us/mission/">http://www.delcredereducroire.be/en/about-us/mission/</a></td>
<td>Delcredere - Ducroire Rue Montoyerstraat 3, 1000 Brussels, Belgium</td>
</tr>
<tr>
<td>Wallonia</td>
<td><a href="http://www.awex.be/de-DE/Pages/Home.aspx">http://www.awex.be/de-DE/Pages/Home.aspx</a></td>
<td>AWEX-Regionalbüro Eupen Hütte, 79/20 4700 Eupen, Belgium</td>
<td>Tel: 32-87-56.82.19 Fax: 32-87-77.33.50 Email: <a href="mailto:mail@awex.be">mail@awex.be</a></td>
</tr>
<tr>
<td>Belgium Corporation for International Investment</td>
<td><a href="http://www.bmi-sbi.be/en/produits.html">http://www.bmi-sbi.be/en/produits.html</a></td>
<td>SBI Avenue de Tervueren 168, bte 9 B-1150 Brussels, Belgium</td>
<td>Tel: +32 2 776 01 00 Fax: +32 2 770 66 38 Email: <a href="mailto:info@bmi-sbi.be">info@bmi-sbi.be</a></td>
</tr>
</tbody>
</table>

**Services for Bulgarian Companies**

<p>| Bulgarian Chamber of Commerce and Industry | <a href="http://www.bcci.bg/bcci-services.html">http://www.bcci.bg/bcci-services.html</a> | 9 Iskar Str., 1058, Sofia, Bulgaria                                                               | Tel: +359 2 8117 400, 987 26 31 Fax: +359 2 987 32 09 Email: <a href="mailto:bcci@bcci.bg">bcci@bcci.bg</a> |
| The National Customs Agency                  | <a href="http://customs.bg/en/page/150">http://customs.bg/en/page/150</a> | National Customs Agency Rakovski 47 Sofia 1202 Bulgaria                                           | Tel: +359 2 9859 4210 Email: <a href="mailto:pr@customs.bg">pr@customs.bg</a> |</p>
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<tr>
<td>OEB: Cyprus Employers and Industrialists Federation</td>
<td><a href="http://en.oeb.org.cy/">http://en.oeb.org.cy/</a></td>
<td>2 Acropoleos Ave. &amp; Glafkou Str, P.O Box 21657 1511 Nicosia Cyprus</td>
<td>Tel: +357 22 66 51 02 Fax: +357 22 66 94 59 Email: <a href="mailto:info@oeb.org.cy">info@oeb.org.cy</a></td>
</tr>
<tr>
<td><strong>Services for Czech Companies</strong></td>
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<tr>
<td>Regional Chamber of Commerce Moravia-Silesia (Krajská hospodářská komora MSK)</td>
<td><a href="http://www.khkmsk.cz/en/">http://www.khkmsk.cz/en/</a></td>
<td>Výstavní 2224/8, 709 00 Ostrava, Mariánské Hory, Czech Republic</td>
<td>Tel: +49 228 249 93-0 Fax: +49 228 249 93-212</td>
</tr>
<tr>
<td><strong>Services for German Companies</strong></td>
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<tr>
<td>Germany Trade &amp; Invest</td>
<td><a href="http://www.gta.de/GTAI/Navigation/EN/Trade/Service/information-service.html">http://www.gta.de/GTAI/Navigation/EN/Trade/Service/information-service.html</a></td>
<td>Villemombler Straße 76 53123 Bonn, Germany</td>
<td>Tel: +49 228 249 93-0 Fax: +49 228 249 93-212</td>
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<tr>
<td>AHK</td>
<td><a href="http://china.ahk.de/services/sourcing-sales/">http://china.ahk.de/services/sourcing-sales/</a></td>
<td>Unit 0811, Landmark Tower II 8 North Dongsanhuan Road Chaoyang District, 100004 Beijing, China</td>
<td>Tel: +84-10-6539-6688 Fax: +84-10-6539-6689 Email: <a href="mailto:info@bj.china.ahk.de">info@bj.china.ahk.de</a></td>
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<td><strong>Services for Danish Companies</strong></td>
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<tr>
<td>The Trade Council</td>
<td><a href="http://kina.um.dk/en/the-trade-council/products-and-services/">http://kina.um.dk/en/the-trade-council/products-and-services/</a></td>
<td>Ministry of Foreign Affairs of Denmark</td>
<td>Tel: +45 33 92 05 00 Email: <a href="mailto:eksportraadet@um.dk">eksportraadet@um.dk</a></td>
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<tr>
<td></td>
<td></td>
<td>Asiatisk Plads 2 DK-1448 Copenhagen, Denmark</td>
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<tr>
<td>The Danish Business Authority</td>
<td><a href="http://danishbusinessauthority.dk/eu-and-international">http://danishbusinessauthority.dk/eu-and-international</a></td>
<td>Langelinie Allé 17 2100 Copenhagen, Denmark</td>
<td>Tel: +45 35 29 10 00 Email: <a href="mailto:erst@erst.dk">erst@erst.dk</a></td>
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<td><strong>Services for Estonian Companies</strong></td>
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<td><strong>Services for Greek Companies</strong></td>
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<tr>
<td>Enterprise Greece</td>
<td><a href="http://www.investingreece.gov.gr/">http://www.investingreece.gov.gr/</a></td>
<td>109 Vasilisis Sophias Avenue 115 21 Athens, Greece</td>
<td>Tel: +30 210 335 5700 Fax: +30 210 324 2079 Email: <a href="mailto:info@enterprisegreece.gov.gr">info@enterprisegreece.gov.gr</a></td>
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<tr>
<td><strong>Services for Spanish Companies</strong></td>
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<tr>
<td>Institut D'Innovacio Empresarial de</td>
<td><a href="http://www.idi.es/web/home.php">http://www.idi.es/web/home.php</a></td>
<td>Plaça de Son Castelló, 1 - 07009, Palma, Illes Balears Spain</td>
<td>Tel: +971 784 650 Fax: +971 784 651 Email: <a href="mailto:info@idi.caib.es">info@idi.caib.es</a></td>
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<tr>
<td>The Foreign Trade and Investment Institute of Castilla-La Mancha (IPEX)</td>
<td><a href="http://ipex.castillalamancha.es/?language=en">http://ipex.castillalamancha.es/?language=en</a></td>
<td>IPEX - Trade and Invest in Castilla - La Mancha C/. Dinamarca, 2 45005 Toledo, Spain</td>
<td>Tel: +34 925 259100 Fax: +34 925 259137 Email: <a href="mailto:consultas@ipex.es">consultas@ipex.es</a></td>
</tr>
<tr>
<td>Asturex</td>
<td><a href="http://www.asturex.org/sites/web/asturexweb/servicios/index.jsp">http://www.asturex.org/sites/web/asturexweb/servicios/index.jsp</a></td>
<td>Sociedad de Promoción Exterior Principado de Asturias S.A. (ASTUREX) CIF: A-74159500 Parque Tecnológico de Asturias. Edificio CEEI 33428 Llanera, Asturias, Spain</td>
<td>Tel: +34 985 26 90 02 Fax: +34 985 26 90 35 Email: <a href="mailto:asturex@asturex.org">asturex@asturex.org</a></td>
</tr>
<tr>
<td>Bilbao Chamber of Commerce / Camara de Comercio de Bilbao</td>
<td><a href="http://www.camarabilbao.com/ccb/portal.portal.action">http://www.camarabilbao.com/ccb/portal.portal.action</a></td>
<td>Alda. Recalde 50 48008 Bilbao, Spain</td>
<td>Tel: 944706500 Fax: 944436171 Email: <a href="mailto:atencionaclientes@camarabilbao.com">atencionaclientes@camarabilbao.com</a></td>
</tr>
<tr>
<td>Camara Oficial de Comercio Eindustria de Toledo</td>
<td><a href="http://www.camaratoledo.com/">http://www.camaratoledo.com/</a></td>
<td>Sala de Exposiciones de la Cámara de Comercio, Plaza de San Vicente, 3, 45001 Toledo, Spain</td>
<td>Tel: +34 925 280 111 Contact Form: <a href="http://www.camaratoledo.com/formularios/contacto/formcontacto.asp?accDesplegar=1&amp;idioma=en">http://www.camaratoledo.com/formularios/contacto/formcontacto.asp?accDesplegar=1&amp;idioma=en</a></td>
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**Services for Finnish Companies**

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<tr>
<td>Finnpartnership</td>
<td><a href="http://www.finnpartnership.fi/www/en/">http://www.finnpartnership.fi/www/en/</a></td>
<td>Uudenmaankatu 16 A, 3rd floor 00120 Helsinki, Finland</td>
<td>Tel: +358 9 348 434 Email: <a href="mailto:fp@finnpartnership.fi">fp@finnpartnership.fi</a></td>
</tr>
<tr>
<td>Nordic Project Fund</td>
<td><a href="http://www.nopef.com/pages/eng/nopef/about-nopef.php">http://www.nopef.com/pages/eng/nopef/about-nopef.php</a></td>
<td>Nordic Environment Finance Corporation NEFCO, PB 241, FI-00171 Helsingfors, Finland</td>
<td>Tel: +358 (0)10 618 003 Email: <a href="mailto:info@nopef.com">info@nopef.com</a></td>
</tr>
<tr>
<td>Service provider</td>
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<tr>
<td>Viexpo</td>
<td><a href="http://www.viexpo.fi/services/">http://www.viexpo.fi/services/</a></td>
<td>Runeberginkatu 11 FI-68600 Pietarsaari, Finland</td>
<td>Tel: +358 6 781 6440 Email: <a href="mailto:viexpo@viexpo.fi">viexpo@viexpo.fi</a></td>
</tr>
<tr>
<td>UCCIFE: Chambres de Commerce et d'Industrie Françaises à l'Etranger</td>
<td><a href="http://www.ccifrance-international.org/">http://www.ccifrance-international.org/</a></td>
<td>46 avenue de la Grande Armée, CS 50071, 75 858 Paris Cedex 17 , France</td>
<td>Tel: +33 01 4069 3760 Fax: +33 01 4069 3783 Email: <a href="mailto:infos@uccife.org">infos@uccife.org</a></td>
</tr>
<tr>
<td>Budapest Chamber of Commerce and Industry (BCCI)</td>
<td><a href="http://www.bkik.hu/en#">http://www.bkik.hu/en#</a></td>
<td>Krisztina krt 99, 1016 Budapest, Hungary</td>
<td>Tel: +36 (1) 488 2000 Fax: +36 (1) 488 2108 Email: <a href="mailto:ugyfelszolgalat@bkik.hu">ugyfelszolgalat@bkik.hu</a></td>
</tr>
<tr>
<td>Hungarian Foundation for Enterprise Promotion</td>
<td><a href="http://www.mva.hu/english.php">http://www.mva.hu/english.php</a></td>
<td>Szépvölgyi út 135., Budapest, III. 1277 Budapest 23, Pf: 4, Hungary</td>
<td>Tel: +36 1 883 0800 Fax: +36 1 883 0841 Email: <a href="mailto:info@mva.hu">info@mva.hu</a></td>
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</tbody>
</table>

**Services for French Companies**

- **UCCIFE**: Chambres de Commerce et d'Industrie Françaises à l'Etranger [http://www.ccifrance-international.org/](http://www.ccifrance-international.org/)

**Services for Hungarian Companies**


**Services for Irish Companies**
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<tbody>
<tr>
<td>Bord Bia (Irish Food Board)</td>
<td><a href="http://www.bordbia.ie/">www.bordbia.ie/</a></td>
<td>Bord Bia - Irish Food Board (Shanghai) 733 Shanghai Centre 1376 Nanjing West Road Shanghai 200040, China</td>
<td>Tel: +86 21 6279 8900 Fax: +86 21 6279 8901 Email: <a href="mailto:info@bordbia.ie">info@bordbia.ie</a></td>
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**Services for Italian Companies**

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<tr>
<th>Italian Trade Agency</th>
<th><a href="http://www.ice.gov.it/home.htm">http://www.ice.gov.it/home.htm</a></th>
<th>Via Liszt 21, 00144 Roma, Italy</th>
<th>Tel: +39 06 5992 9439 Email: <a href="mailto:ice@pec.ice.it">ice@pec.ice.it</a></th>
</tr>
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<tr>
<td>Toscana Promozione</td>
<td><a href="http://www.toscanapromozione.it/">www.toscanapromozione.it/</a></td>
<td>Toscana Promozione, Via Vittorio Emanuele II, 62-64, 50134 Firenze, Italy</td>
<td>Tel: +39 055 462801 Email: <a href="mailto:toscanapromozione@postacert.toscana.it">toscanapromozione@postacert.toscana.it</a></td>
</tr>
<tr>
<td>Regione Emilia Romagne</td>
<td><a href="http://imprese.regione.emilia-romagna.it/">http://imprese.regione.emilia-romagna.it/</a></td>
<td>Viale Aldo Moro 44, 40127 Bologna, Italy</td>
<td>Tel: +39 051 5276309 Email: <a href="mailto:sportelloestero@regione.emilia-romagna.it">sportelloestero@regione.emilia-romagna.it</a></td>
</tr>
</tbody>
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**Services for Lithuanian Companies**

| Kaunas Chamber of Commerce, Industry and Crafts | [http://chamber.lt/EN/Home/Services](http://chamber.lt/EN/Home/Services) | Kaunas Chamber of Commerce K. Donelaicio str. 8, 44213 Kaunas, Lithuania                     | Tel: +370 37 229212 Email: chamber@chamber.lt                                           |

**Services for Luxembourgian Companies**
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<tr>
<td>Luxinnovation</td>
<td><a href="http://en.luxinnovation.lu/Services">http://en.luxinnovation.lu/Services</a></td>
<td>7, rue Alcide de Gasperi L-1615 Luxembourg</td>
<td>Tel: +352 43 6263 Ext.1 Fax: +352 43 8120 Email: <a href="mailto:info@luxinnovation.lu">info@luxinnovation.lu</a></td>
</tr>
<tr>
<td>Investment and Development Agency of Latvia</td>
<td><a href="http://www.liaa.gov.lv/en">http://www.liaa.gov.lv/en</a></td>
<td>2 Perses Street, Riga, LV-1442, Latvia</td>
<td>Tel: +371 67039400 Fax: +371 67039401 Email: <a href="mailto:liaa@liaa.gov.lv">liaa@liaa.gov.lv</a></td>
</tr>
<tr>
<td>Latvian Guarantee Agency</td>
<td><a href="http://www.lga.lv/index.php?id=1&amp;L=1">http://www.lga.lv/index.php?id=1&amp;L=1</a></td>
<td>Zigfrīda Annas Meierovica bulvāris 14, Rīga, 1050, Latvia</td>
<td>Tel: +371 67216081 Fax: +371 67359374 Email: <a href="mailto:lga@lga.lv">lga@lga.lv</a></td>
</tr>
<tr>
<td>Chamber of Commerce Amsterdam</td>
<td><a href="http://www.kvk.nl/english/international-trade/">http://www.kvk.nl/english/international-trade/</a></td>
<td>De Ruyterkade 51013, Amsterdam, The Netherlands</td>
<td>Tel: +31 20 531 40 00 Email: <a href="mailto:info@amsterdam.kvk.nl">info@amsterdam.kvk.nl</a></td>
</tr>
<tr>
<td>Netherlands Enterprise Agency (RVO) / Agentschap NL (AGNL)</td>
<td><a href="http://english.rvo.nl/home/about-rvonl/what-is-rvonl">http://english.rvo.nl/home/about-rvonl/what-is-rvonl</a></td>
<td>RVO.nl in The Hague (Centre Court) Prinses Beatrixlaan 2 2595 AL The Hague, The Netherlands Postal address: P.O. Box 93144 2509 AC The Hague, The Netherlands</td>
<td>Tel: +31 88 602 50 00 Fax: +31 88 602 90 23 Contact Form: <a href="http://english.rvo.nl/home/about-rvonl/what-is-rvonl/contact-form">http://english.rvo.nl/home/about-rvonl/what-is-rvonl/contact-form</a></td>
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<tr>
<td><strong>Services for Polish Companies</strong></td>
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<td>Trade and Investment Promotion Section of Polish Embassy in Beijing</td>
<td><a href="https://beijing.trade.gov.pl/en/o_nas/article/detail,38,Trade_Investment_Promotion_Section_the_Embassy_of_the_Republic_of_Poland.html">https://beijing.trade.gov.pl/en/o_nas/article/detail,38,Trade_Investment_Promotion_Section_the_Embassy_of_the_Republic_of_Poland.html</a></td>
<td>Trade and Foreign Investment Promotion Section, Embassy of Poland, 1, Ritan Road, 100600, Beijing, China</td>
<td>Tel: +86 10 6532 1888</td>
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<tr>
<td></td>
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<td>Fax: +86 10 65325364</td>
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<td>Fax: +22 432 86 20</td>
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<td><strong>Services for Portuguese Companies</strong></td>
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<tr>
<td>AICEP Portugal Global</td>
<td><a href="http://www.portugalglobal.pt/EN/Pages/Index.aspx">http://www.portugalglobal.pt/EN/Pages/Index.aspx</a></td>
<td>8 Sanlitun Dongwu Jie Beijing 100600, China</td>
<td>Tel: +86 10 6532 0401/5</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Fax: +86 10 6532 6746</td>
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<tr>
<td><strong>Services for Romanian Companies</strong></td>
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<td></td>
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</tr>
<tr>
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<td></td>
<td></td>
<td>Fax: +86 10 6532 5728</td>
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<tr>
<td><strong>Services for Swedish Companies</strong></td>
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<tr>
<td></td>
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<td>Fax: +86 10 5815 6223</td>
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<td>Service provider</td>
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<td>Address</td>
<td>Contact</td>
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</table>
| Innovationsbron AB | [http://www.almi.se/English/](http://www.almi.se/English/) | N/a | Tel: +46 0771 55 85 00  
Email: info.lanadm@almi.se |
| **Services for Slovenian Companies** | | | |
18 Xiaoyun Road  
King’s Garden Villas, No. 57, Block F  
Chaoyang District, Beijing 100125, China | Tel: +86 10 6468 1030  
Fax +86 10 6468 1040  
Email: vpe@gov.si |
| **Services for Slovakian Companies** | | | |
| SARIO (Slovak Investment and Trade Development Agency); and Slovak Chamber of Commerce and Industry | [http://www.sario.sk/en](http://www.sario.sk/en) | Slovak Investment and Trade Development Agency, Trnavská cesta 100  
821 01 Bratislava, Slovak Republic | Tel: +421 2 58 260 100, 101  
Fax: +421 2 58 260 109  
Email: sario@sario.sk |
| **Services for UK Companies** | | | |
| United Kingdom Trade and Investment (UKTI) | https://www.gov.uk/government/organisations/uk-trade-investment | UKTI head office (General Enquiries)  
1 Victoria Street  
London, SW1H 0ET, UK | Tel: +44 020 7215 5000  
Email: enquiries@ukti.gsi.gov.uk |
4.4 Calendar of trade events and exhibitions

Attending trade events and exhibitions can help promote your product in China as well as forge relationships with industry figures and useful business contacts.

<table>
<thead>
<tr>
<th>Event</th>
<th>Focus</th>
<th>Date</th>
<th>Recurrence</th>
<th>City</th>
<th>Website</th>
<th>Venue</th>
<th>Organiser details</th>
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<td>CIFBF 2015 - The 7th China (Beijing) International Food and Beverage Fair 2015</td>
<td>Food &amp; Beverage</td>
<td>3-5 July 2015</td>
<td>Annual since 2011</td>
<td>Beijing</td>
<td>[<a href="http://www.chinaexhibition.com/Official_Site/11-6402-CIFBF_2015">http://www.chinaexhibition.com/Official_Site/11-6402-CIFBF_2015</a> - The 7th China (Beijing) International Food and Beverage Fair 2015.html](<a href="http://www.chinaexhibition.com/Official_Site/11-6402-CIFBF_2015">http://www.chinaexhibition.com/Official_Site/11-6402-CIFBF_2015</a> - The 7th China (Beijing) International Food and Beverage Fair 2015.html)</td>
<td>China Beijing International Conference Center</td>
<td>Beijing Minghua International Exhibition Co., Ltd. Mr. Yang Yi E-Mail: <a href="mailto:minghuaexpo@188.com">minghuaexpo@188.com</a> Tel: +86-10-5728 9278</td>
</tr>
<tr>
<td>Event Name</td>
<td>Industry</td>
<td>Dates</td>
<td>Location</td>
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<tr>
<td>Guangzhou Food Expo 2015</td>
<td>Food &amp; Beverage</td>
<td>27-31 August 2015</td>
<td>Pazhou</td>
<td>Guangzhou Yi-Wu International Exhibition Co., Ltd. <a href="mailto:LC.DEP6@GZYIWU.COM">LC.DEP6@GZYIWU.COM</a> Tel: +86-20-8923 1623 ext. to Food Expo Organizer</td>
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<td>CFIE 2015 - Shanghai International Condiments and Food Ingredients Exhibition 2015</td>
<td>Food &amp; Beverage</td>
<td>26-28 August 2015</td>
<td>Annual since 2012</td>
<td>Shanghai New International Expo Centre (SNIEC)</td>
<td>Shanghai Gehua Exhibition Service Co.,Ltd (SGES)Contact:Stephanie Su E-Mail:<a href="mailto:stephaniegh@126.com">stephaniegh@126.com</a> Tel: +86-21-6775 9083</td>
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<td>China Good Food Show 2015</td>
<td>Food &amp; Beverage Meat, Poultry &amp; Seafood</td>
<td>26-28 August 2015</td>
<td>Annual since 2010</td>
<td>Shanghai New International Expo Centre (SNIEC)</td>
<td>Shanghai Gehua Exhibition Service Co.,Ltd (SGES)Contact:Stephanie Su E-Mail:<a href="mailto:stephaniegh@126.com">stephaniegh@126.com</a> Tel: +86-21-6775 9083</td>
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<td>FHW CHINA 2015 - Food Hospitality World China 2015</td>
<td>Food &amp; Beverage Hospitality Equipment &amp; Supplies</td>
<td>22-24 September 2015</td>
<td>Annual since 2012</td>
<td>China Import and Export Fair Pazhou Complex, Guangzhou</td>
<td>Worldex Fiera Milano Exhibitions (Guangzhou) Co., Ltd. Michael Fu;Cyrus Chen E-Mail:<a href="mailto:fhwichina@worldexfm.com">fhwichina@worldexfm.com</a> Tel: +86-20-8327 6271/ 6990</td>
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<td>Expat Show 2015 - The 9th Expat Show Shanghai 2015</td>
<td>Travel &amp; Tourism Real Estate, Properties, Investment Food &amp;</td>
<td>11-13 September 2015</td>
<td>Annual since 2007</td>
<td>Shanghai Exhibition Center (SEC)</td>
<td>World Events Agency (WEA) <a href="mailto:info@weacn.com">info@weacn.com</a> Tel: +86-21-6418 5550</td>
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<td>China Foodtech 2015 - The 14th International Food Processing and Packaging Machinery Exhibition</td>
<td>Plant &amp; Machinery, Food &amp; Beverage Processing</td>
<td>19-21 October 2015</td>
<td>Biennial (in odd years) since 1989</td>
<td>Beijing</td>
<td><a href="http://www.chinaexhibition.com/Official_Site/11-5895-China_Foodtech_2015_-_The_14th_International_Food_Processing_and_Packaging_Machinery_Exhibition.html">Website</a></td>
<td>CIEC Exhibition Company Limited, CIEC Group <a href="mailto:pfmc-zhlb@263.net">pfmc-zhlb@263.net</a> Tel: +86-10-6488 2564/2410/2079/2078; +86-10-6852 5634 Fax: +86-10-6852 3345</td>
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<tr>
<td>CXIVFF 2015 - The 8th China Xiamen International Vegetarian Food Fair (Autumn)</td>
<td>Food &amp; Beverage</td>
<td>15-19 October 2015</td>
<td>Biannual since 2012</td>
<td>Xiamen</td>
<td><a href="http://www.chinaexhibition.com/Official_Site/11-7442-CXIVFF_2015_-_The_8th_China_Xiamen_International_Vegetarian_Food_Fair_(Autumn).html">Website</a></td>
<td>Xiamen International Conference &amp; Exhibition Center (XICEC)</td>
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<td>The 6th IND China (Beijing) International Modern Grain And Oil Machinery Exhibition</td>
<td>Plant &amp; Machinery Food &amp; Beverage Agriculture &amp; Animal Husbandry Oil &amp; Gas</td>
<td>11-13 Nov 2015</td>
<td>Annual since 2010</td>
<td>Beijing</td>
<td><a href="http://www.chinaexhibition.com/Official_Site/11-7284-The_6th_IND_China_(Beijing)_International_Modern_Grain_And_Oil_Machinery_Exhibition.html">http://www.chinaexhibition.com/Official_Site/11-7284-The_6th_IND_China_(Beijing)_International_Modern_Grain_And_Oil_Machinery_Exhibition.html</a></td>
<td>China International Exhibition Center (CIEC) Yonghong International Kunxiao Expo (Shanghai) Co.,Ltd Ms. Tawnie Tang E-Mail:<a href="mailto:tawnietang@hotmail.com">tawnietang@hotmail.com</a> <a href="mailto:cnexpo88@gmail.com">cnexpo88@gmail.com</a> Tel: +86-10-6591 8902;+86-187-100 862 95</td>
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<td>Event</td>
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Koelnmesse, China Chamber of Commerce of Foodstuff and Native Produce (CCCFNA)  Mr. Ryan Lam  Tel: +86 10 6590 7766 ext 766  Fax: +86 10 6590 6139  E-mail: r.lam@koelnmesse.cn

Sea Fare Expositions, Inc.E-Mail:seafoodchina@seafare.com  Tel: +2067-8957 41 ext 334

China International Exhibitions (CIE) Ltd.Ms Lily Zhu; Ms Becky Sun  Tel: +86 21 6209 5209  Fax: +86 21 6209 5210  Email: fhc@chinaallworld.com
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<thead>
<tr>
<th>Event</th>
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<td><strong>iFresh China 2015 - iFresh China Fruit &amp; Vegetable Exhibition 2015</strong></td>
<td>Food &amp; Beverage Agriculture &amp; Animal Husbandry Logistics &amp; Transportation</td>
<td>19-21 November 2015</td>
<td>Annual</td>
<td>Shanghai</td>
<td>iFresh Information Ltd. Zender Zhao</td>
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<tr>
<td><strong>Winexpo 2015 - The 15th Shanghai International Wine &amp; Spirits Exhibition 2015</strong></td>
<td>Wine &amp; Spirits Food &amp; Beverage</td>
<td>4-6 December 2015</td>
<td>Annual since 2001</td>
<td>Shanghai</td>
<td>Shanghai Golden Commercial Exhibition Co., Ltd.</td>
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# ANNEX I European products registered as GIs within the People’s Republic of China (under SAIC and AQSIQ)

<table>
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<tr>
<th>Country</th>
<th>Name</th>
<th>Registering Entity</th>
<th>Product Category</th>
<th>SAIC Registration Number</th>
<th>SAIC (Trademark) Registration Year</th>
<th>AQSIQ Registration Year</th>
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<tr>
<td>1 France</td>
<td>布拉伊-波尔多山坡 BLAYE - COTES DE BORDEAUX</td>
<td>波尔多葡萄酒行业联合委员会 CONSEIL INTERPROFESSIONNEL DU VIN DE BORDEAUX</td>
<td>Wine</td>
<td>10528085</td>
<td>2014</td>
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<td>2 France</td>
<td>弗龙萨克 FRONSAC</td>
<td>波尔多葡萄酒行业联合委员会 CONSEIL INTERPROFESSIONNEL DU VIN DE BORDEAUX</td>
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<td>10528087</td>
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<td>2015 *</td>
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<td>韦雷-格拉夫 GRAVES DE VAYRES</td>
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The information in this table are from the governmental documents listed below. Currently there is no EU products registered under the Agricultural Product Quality Safety Centre (AQSC) of the Ministry of Agriculture (MOA).

2. Trademark list for registered and preliminary examined GI products from Jan to Jun 2014 (36 from the EU). [http://sbj.saic.gov.cn/dlbz/xwbd/201409/t20140909_148211.html](http://sbj.saic.gov.cn/dlbz/xwbd/201409/t20140909_148211.html)

Products marked with * indicate they are still under reviews after their application being accepted by AQSIQ (as of July 2015).
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<td>波尔多葡萄酒行业联合委员会 CONSEIL INTERPROFESSIONNEL DU VIN DE BORDEAUX</td>
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### ANNEX II Database of professional buyers

The Database of professional buyers reflects the contact information as of June 2015.

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<th>Company name</th>
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<th>Phone</th>
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<tr>
<td>AEON Preferential Advantages and International Trading (Shanghai) Co., Ltd.</td>
<td>Distribution</td>
<td>Mr Tao Xing</td>
<td>86-021-33870707</td>
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<tr>
<td>Ausinowell(Beijing)Technology &amp;Trade Co., Ltd.</td>
<td>Distribution</td>
<td>Ms Nan Ma</td>
<td>86-10-63185386</td>
<td><a href="mailto:sales@ausinowell.com.cn">sales@ausinowell.com.cn</a></td>
<td><a href="http://www.ausinowell.com.cn/">http://www.ausinowell.com.cn/</a></td>
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<td>AUSWINES CHINA WINE ESTATE co., LTD</td>
<td>Distribution</td>
<td>Mr Zhi Ma</td>
<td>13342740533</td>
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<td><a href="http://www.auswines.com.cn/index.php/Home/About/about/iclass5.html">http://www.auswines.com.cn/index.php/Home/About/about/iclass5.html</a></td>
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<tr>
<td>B &amp; C Toennies Fleischwerk GmbH</td>
<td>Distribution</td>
<td>Mr Dong Liu</td>
<td>010-6500 0930-82</td>
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<td><a href="http://www.toennies.cn">http://www.toennies.cn</a></td>
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<tr>
<td>Baili Baisheng (Beijing) Food Technology Development Co., Ltd.</td>
<td>Distribution</td>
<td>Ms Wenjing Wei</td>
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<td>Distribution</td>
<td>Ms Ling Li</td>
<td>010-51581077 / 13841399997</td>
<td><a href="mailto:mail@wine-marcopolo.com">mail@wine-marcopolo.com</a></td>
<td><a href="http://euro-island.com/bbx/857463-857463.html">http://euro-island.com/bbx/857463-857463.html</a></td>
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<td>Mr Xiangji Chen</td>
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<td>Co., Ltd.</td>
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<td>Mr Mengxiang Zheng</td>
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<td>Ms Jiangfeng Chen</td>
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<td>Mr Larry Chen</td>
<td>010-85671234</td>
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<td>13552758482 15311668081</td>
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<td>Mr Zhicheng Li</td>
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<td>Mr Hao Zhuang</td>
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<td>Retail/wholesale Ms Xiuyun Cui 010-64988362 010-64988363 <a href="mailto:milkyway@bj-milky.com">milkyway@bj-milky.com</a> <a href="http://bj-milkyway.com/welcome/">http://bj-milkyway.com/welcome/</a></td>
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<td>Retail/wholesale Mr Xiaobo Peng 010-58700535 010-58701078 contact.bj@vd gcn.com <a href="http://www.vdgcn.com/">http://www.vdgcn.com/</a></td>
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<td>Carbaryl Fu Yan (Beijing) Co., Ltd.</td>
<td>Retail/wholesale Mr Yijue Zhang 010-51949326 Info@silverfer n.cn <a href="http://silverfern.cn/">http://silverfern.cn/</a></td>
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<td>Jenny Lou's</td>
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<td>Mr Jiangtao Jia 010-65065126</td>
<td><a href="mailto:jennyloushop@yahoo.com.cn">jennyloushop@yahoo.com.cn</a></td>
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<td>Mitsubishi Corporation</td>
<td>Retail/wholesale</td>
<td>Ms Wenzhu Dong 65183030-393</td>
<td><a href="mailto:luofeng6166@yahoo.com.cn">luofeng6166@yahoo.com.cn</a></td>
<td><a href="http://www.mitsubishicorp.com/jp/zh/">http://www.mitsubishicorp.com/jp/zh/</a></td>
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<td>NGS supermarket (Group) Co., Ltd.</td>
<td>Retail/wholesale</td>
<td>Service Center: 021-96896</td>
<td><a href="mailto:service@ngs1685.com">service@ngs1685.com</a></td>
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<td>Renrenle Chain Business Group Co., Ltd.</td>
<td>Retail/wholesale</td>
<td>Mr. Ping Pan Service Center: 0755-26093666</td>
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<td><a href="http://www.renrenle.cn/">http://www.renrenle.cn/</a></td>
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<td>RS Lifestyle Limited</td>
<td>Retail/wholesale</td>
<td>Mr Barry Yeung</td>
<td>(852) 2620-6626(HK) (886) 2603-9225(TW)</td>
<td><a href="mailto:info@rs-lifestyle.com">info@rs-lifestyle.com</a>(HK) <a href="mailto:info-tw@rs-lifestyle.com">info-tw@rs-lifestyle.com</a>(TW) <a href="http://rs-lifestyle.com/">http://rs-lifestyle.com/</a></td>
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<td>Sam's Club</td>
<td>Retail/wholesale</td>
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<td>Business Development Department: 021-38821407</td>
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<td>SEVEn-ELEVEn (Beijing) Co., Ltd.</td>
<td>Retail/wholesale</td>
<td>Ms Jia Qi</td>
<td>020-83647530</td>
<td>- <a href="http://www.7-11bj.com.cn/">http://www.7-11bj.com.cn/</a></td>
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<td>Shandong GuoPeng Trade Co., Ltd.</td>
<td>Retail/wholesale</td>
<td>Mr Bin Zhang</td>
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<td>Shanghai City Shop Co., Ltd.</td>
<td>Retail/wholesale</td>
<td>Mr Zongcai Zhang</td>
<td>021-62327070</td>
<td><a href="mailto:info@cityshop.com.cn">info@cityshop.com.cn</a> <a href="http://www.cityshop.com.cn/">http://www.cityshop.com.cn/</a></td>
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<td>Shanghai Songguang Trading Co., Ltd.</td>
<td>Retail/wholesale</td>
<td>Mr Zhifeng Wang</td>
<td>400-9200-158 18221322557</td>
<td><a href="mailto:info@formulator.com.cn">info@formulator.com.cn</a> <a href="mailto:cloris.zeng@formulator.com">cloris.zeng@formulator.com</a> <a href="http://www.formulator.com.cn/">http://www.formulator.com.cn/</a></td>
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<td>Tcoffee/ATHENAScience&amp;Technology Co., Ltd</td>
<td>Retail/wholesale</td>
<td>Mr Dongbi Song</td>
<td>010-8477-5441/2</td>
<td><a href="mailto:tcoffee.biz@163.com">tcoffee.biz@163.com</a> <a href="http://tcoffeebiz.taobao.com/?spm=2013.1.0.0.IZP2P">http://tcoffeebiz.taobao.com/?spm=2013.1.0.0.IZP2P</a></td>
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<td>Mr Zengkai Shao</td>
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<td>Tong Yi(Shanghai) Trading Co., Ltd.</td>
<td>Retail/wholesale</td>
<td>Mr Jinjie Xie</td>
<td>021-22168888 18221918146</td>
<td>- <a href="http://shjiading050473.11467.com/">http://shjiading050473.11467.com/</a></td>
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<td>Trust-Mart investment and Development Co., Ltd.</td>
<td>Retail/wholesale</td>
<td>Mr Fei Liu</td>
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<td><a href="http://www.wal-martchina.com">http://www.wal-martchina.com</a></td>
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<td>WALMART (China) Investment Co., Ltd.</td>
<td>Retail/wholesale</td>
<td>Ms Xuejing Zhang</td>
<td>0755-21512288</td>
<td><a href="http://www.wal-martchina.com">http://www.wal-martchina.com</a></td>
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<td>Wenfeng Great World Chain Development Co., Ltd.</td>
<td>Retail/wholesale</td>
<td>Business Development Department: 0513-85505666-8997</td>
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<td>Wumart Stores, Inc.</td>
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<td>Xiamen GuanYou Trade Co., Ltd</td>
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<td>Mr Changfu Lai</td>
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<td>Mr Baoshou Zhang</td>
<td>592-5161888</td>
<td><a href="mailto:itgchina@itg.com.cn">itgchina@itg.com.cn</a></td>
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<td>Yonghui Superstores</td>
<td>Retail/wholesale</td>
<td>Mr Bin wu</td>
<td>Service Center:800-858-1030</td>
<td><a href="http://www.yonghui.com.cn/">http://www.yonghui.com.cn/</a></td>
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<td>Zhongbai Chain Store</td>
<td>Retail/wholesale</td>
<td>Service Center: 0536-8580029</td>
<td><a href="mailto:lscsddb@sina.com">lscsddb@sina.com</a></td>
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