Report Highlights:

As the largest export market for the United States, China provides a promising yet competitive market for agricultural products. As the pandemic continues to restrict travel movements, U.S. exporters are encouraged to continue engaging with key Chinese stakeholders via online meetings, matchmaking events, conferences, and trade shows. This report provides practical tips to U.S. agricultural, forestry, and fishery exporters on how to conduct business in China, while includes information on local business practices, a review of consumer preferences, food standards and regulations, and import and inspection procedures.
**China Market Fact Sheet**

**Executive Summary**
China is the world's second-largest economy, and growth is driven by consumption and investment, but the government has expressed interest in shifting to a consumption-led economy. China revised down its 2020 gross domestic product (GDP) growth rate to 2.2 percent and stated its 2021 GDP should exceed the target of six percent. In 2020, U.S. agricultural exports to China totaled $26.4 billion, up from $12.6 billion in 2019. China was the largest market for U.S. agricultural exports, a position it last held in 2016.

**Imports of Consumer-Oriented Products**
In 2020, China imported consumer-oriented agricultural products from the United States worth nearly $7.1 billion.

**Food Processing Industry**
In 2020, China's overall food and beverage production volume grew 6.3 percent. Despite the downward economic pressure and the impact of COVID-19, the food manufacturing and food processing sectors remained stable. Most of China's food processing ingredients come from domestic producers, increasing demand for imported ingredients in the higher-end market.

**Food Retail Industry**
In 2020, overall retail sales of consumer goods declined for the first time in the past ten years as the pandemic took a toll on disposable incomes and in-store shopping. In 2020, online retail sales increased by 11 percent compared to 2019. Online grocery and food sales increased by 31 percent year-over-year, as consumers increasingly used mobile delivery applications to have fresh produce and other grocery items delivered to their door. Traditional offline-only retail chain market share continued to erode due to pandemic-related movement restrictions and consumer preferences for online grocery and food delivery.

**Quick Facts**

**2020 Imports of Consumer-Oriented Products**
$89.3 billion *

**Products with Potential Growth in Host Market**
1) Pork & pork products 2) Dairy products
3) Fish products 4) Beef and beef products
5) Fresh fruit 6) Food preps
7) Poultry & products 8) Meat products NESOI
9) Wine & beer 10) Tree nuts

**Retail Industry Gross Sales (USD $ trillion)**
Total retail sales: $6.04
Online sales: $1.81

**Top 10 Supermarket Chains**

**GDP/Population (2020)**
Population: 1.4 billion
GDP (current US$): $15.9 trillion
GDP per capita (current US$): $11,360
Per capita food expenditure: $1004

**Sources:** Trade Data Monitor (TDM) and the 2021 China Statistic Book

**SWOT**

<table>
<thead>
<tr>
<th>Strength</th>
<th>Weakness</th>
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<tr>
<td>U.S. food products are perceived as high quality and safe, offer a wide selection.</td>
<td>Increased tariffs and bilateral political uncertainty.</td>
</tr>
<tr>
<td></td>
<td>COVID testing on outer packaging adds costs and risk.</td>
</tr>
</tbody>
</table>

**Opportunity | Threat**

- Increasing health awareness
- Online and fresh grocery delivery.
- The U.S. – China Phase One Trade Agreement expanded market access and improved competitiveness.
- Consumers increasingly trust domestic food production, processing, and safety.
- Reduced disposable income caused by macroeconomic headwinds.
**SECTION I. MARKET OVERVIEW**

Due to the sheer size of China, its consumer market is complex and diverse. Since the pandemic, consumer purchasing behavior has evolved to become more digital, while purchasing tastes have become more focused on lifestyle (eating better, enjoying time at home). Pet ownership (and thus pet food purchases) increased dramatically in 2020. The bakery sector also saw gains. With increasing demands for meat, and swine herds largely rebounded from the 2018/2019 African Swine Fever outbreak, China is expected to continue poultry and beef imports well into 2022.

The middle-class and disposable incomes are growing though a gap remains between first and second-tier cities and rural Chinese. In the case of the former, more is being spent on imported products and luxury items. According to Goldman Sachs, consumption has not yet reached pre-pandemic levels though shows positive signs of recovery. China released the 14th Five Year Plan with ambitious goals to eradicate poverty in rural areas which could lead to a further increase in the middle-class.

The U.S.-China (Phase One) Trade Agreement continues to support U.S. food and agricultural exports to China (notably soybeans, pork, corn, and beef). China extended the tariff exclusion process to waive Section-301 retaliatory tariffs on imports of U.S. agricultural products to the end of 2021, and implementation of the exclusion has been smooth.

**Retail Industry**

Retail sales reached $6.14 trillion in 2020, of which 24 percent was derived from e-Commerce. Online retail sales increased by 10.9 percent over the 12 months and have continued to grow in 2021. Over 782 million Chinese people made purchases online in 2020. Improvements in logistics continue to support movement of products far beyond first tier cities.

**Hotel, Restaurant, and Institutional (HRI) Industry**

The hospitality industry is recovering but demand of China’s HRI industry is yet to return to pre-COVID-19 levels. As it rebounds, the HRI industry will provide greater opportunities for exporting meat, live seafood and fresh fruits and vegetables. Middle-class consumers enjoy dining out.

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<th>Challenges</th>
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<td>U.S. exporters can adapt to increased digital engagement to connect online with Chinese private foreign trade importers.</td>
<td>Logistical and technical challenges to online engagements, i.e., time spent attending and hosting trade shows, meetings, troubleshooting errors, etc.</td>
</tr>
<tr>
<td>Opportunities for protein exports to China to fill protein demands (pork, poultry, beef, seafood).</td>
<td>Some perceived beliefs that imported meats are not as safe as domestic herds. Devote time to educating about the quality and safety of U.S. meat exports.</td>
</tr>
<tr>
<td>Consumer-oriented food products that deliver fresh, nutritional, and convenient solutions for the urban, middle-class.</td>
<td>Supply chains and stringent, strict, and unclear &amp; changing customs policies, tariffs can be inconsistent. FAS provides guidance on this.</td>
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</table>
**Key Takeaways**

**Be Patient:** Chinese importers know there is consumer demand for and value in U.S. products. Some importers perceive risks related to tariffs and bilateral tensions (inc. further Phase One Trade Agreement discussions) to be too great. Imports can be influenced by trade agreements, competitor prices and quality, and COVID-19 outbreaks and recovery progress.

**Embrace Change:** As in other countries, Chinese companies adapted to bring trade shows, meetings and promotions online for business-to-business (B2B) engagements. Increases in online sales of food and food products drove business-to-consumer (B2C) spending. With international travel still severely restricted, consider online events. Identify your target market early and meet them where they are. Explore a platform that works for Chinese and US audiences and be prepared to devote a significant amount of time to logistics, mitigating technical difficulties and preparations.

**Tailor Product Offerings:** Regions in China have distinct taste preferences and styles. Focus on one or two regions where your products match or can be modified to fit regional taste or demand preferences. Also, keep in mind that online sales provide an opportunity for smaller sized units to be sold to private buyers.

**Product Education:** As some U.S. products may not be priced as competitively as other countries, be prepared to work with partners to educate end-users about the quality, standards, grades, cuts and freshness of products. These efforts will add value to products and detail why U.S. exports are a superior choice.

**Recent Food and Agricultural Product Trends**

- Consumers increasingly want high-quality, healthy, convenient food solutions. Top processed food products exported to China in 2020 were: processed or prepared dairy, prepared or preserved meat, vegetables and pulses, syrups, sweeteners, fruit (canned, dried, frozen).

- Pet food and packaged foods (including breakfast cereals, baked goods, sauces, and condiments) are also trending up. Simultaneously, supermarket and convenience store outlets are expanding, for smaller outlets in communities.

- National pride underpins support for Chinese made, manufactured and grown products. Some believe that imported products may carry COVID-19.

- Growing middle incomes lead people to ‘upgrade’ their eating habits to items once considered luxury such as imported tree nuts, prepared food, wine, snack foods and live seafood.

- Middle-income families enjoy dining out more while, with strict travel limitations, younger generations seek international experiences available to them domestically.
SECTION II. EXPORTER BUSINESS TIPS

The Chinese export market large, competitive and complex; competition is fierce. Exporters need to remain up to date, connected with importers, and prepared to invest in marketing. For the best chance of success, exporters should familiarize themselves with current and forecasted market data. See Section VI (Trade Assistance for Exporters) for further resources.

China’s 6 Top Trading Partners (2020)
Source: National Bureau of Statistics China

Know the Chinese regulations for your industry and product(s). With regular changes to food and agricultural regulations and standards, customs, tariffs, and imports, it is important to know what is new for your industry and product(s). Your buyer may be able to help obtain new official requirements in writing and assist with clearance. FAS can also help to clarify and resolve issues with new requirements. The same rules may not apply for all products nor through all ports. See SECTION III for more information.

Protect your brand early by registering patents and trademarks with the China Trademark Office (CTMO). China has a ‘first-to-file’ policy for trademark registration.

Market Research
Research the target market with the objectives of your company in mind. Marketing a range of products may spread resources too thin to penetrate the market. Focus on marketing one or two products well and discuss your strategy with a local representative who understands China’s economy and markets. FAS provides free market research reports available via GAIN.

Visit China. Until international travel normalizes, working through a local business consultant can be a viable solution. Local partners and distributors are especially useful for smaller companies without large marketing budgets. They can assist with marketing and taking orders. Entry processes are currently onerous; check the State Department and the Chinese Embassy in the U.S. websites for the latest travel information and requirements.

Connect online through marketing events, trade shows, meetings, and conferences. International events are being increasingly held online, a trend which will continue. Consider FAS’ tips for virtual marketing events. Some exporters host their own online marketing events; from live streaming harvest, industry conferences and online tastings, be creative with how you reach and engage with importers.

Effective marketing campaigns often impact purchasing decisions. Joining larger campaigns with FAS and State and Regional Trade Groups, including Food Export-Midwest and Food Export-Northeast, Southern United States Trade Association (SUSTA), and Western United States Agricultural Trade Association (WUSATA) can draw more attention than individual promotions and are more cost-effective.
Local Business Customs and Trends
Understanding the business and cultural customs of China and the current bilateral U.S.-China relationship is key to establishing and maintaining business relationships.

Communication. Chinese communication styles are generally more subtle than typical western ones, though there are regional differences in style. In addition, consider the regional dialects where you will be doing business. Hire an interpreter who can help with both the language and the meaning.

The eastern concept of ‘losing face’ can destroy business relationships, even if unintentional. Research in-person and online etiquette tips. Understand gift giving norms and expectations. Be patient during negotiations and do not lose your temper if things are progressing too slowly. Chinese contacts may be less direct than U.S. counterparts, especially when seeking to express an unwillingness to do something.

Guanxi is essential for fair pricing, assistance with customs, maintaining supply chains, and more. Guanxi is a network of people one can trust and rely on for help and support, similar to the Western notion of, it isn’t what you know, but who you know. If a Chinese businessperson does a favor for you, they will expect it to be reciprocated. When looking to establish a new partnership, try to be introduced by a common party. Cold calls are rarely successful.

Business cards (and WeChat). The exchange of business card with information in English and Chinese is still accepted, but in some cases phasing out in favor of digital connections. WeChat is ubiquitous to establish and maintain communication, in some cases replacing email. View your contact’s posts to understand their business interests and opportunities. The built-in translation tool is also generally good.

Plan accordingly to avoid Chinese holidays. The two largest and longest public holidays are Mid-Autumn Festival/Golden Week (first week of October) and the Lunar New Year (one-to-two weeks, mid-January to mid-February) when most businesses close. Most holidays follow the lunar cycle so dates will vary.

Take the time to negotiate an agreement that works for you. Importers know that China is a large lucrative market so they may ask for favorable terms. Many buyers will ask for exclusivity deals, a large initial order quote, or marketing support. Exclusivity agreements can be beneficial for some companies, but regional or limited exclusivity agreements are generally preferred over an all-China agreement.

SECTION III. IMPORT FOOD STANDARDS & REGULATIONS and PROCEDURES
The United States’ food and agricultural legal, commercial, reporting and enforcement systems differ from China’s. Furthermore, China revises its systems regularly and often without warning, making it challenging to understand and stay current with the systems. Exporters are encouraged to use all resources available to avoid as many customs clearance problems as possible.

- The five USDA FAS offices across China can provide support to exporters and routinely publish reports on new policies and developments. You can view recent reports about China or search for reports by topics or keywords. Check for new reports. The General Administration of Customs (People’s Republic of China) also list laws, regulations, and decrees.
- Read the “FAIRS Export Certificate Report - Food and Agricultural Import Regulations and Standards”. This report lists major export certificates required by the Chinese government for imports of food and agricultural products.
- Read the “FAIRS Country Report - Food and Agricultural Import Regulations and Standards” report. This report is an index of all agricultural product import regulations and standards.

- The USDA Animal and Plant Health Inspection Service (APHIS) has an office in Beijing. APHIS plays a vital role in ensuring that U.S. agricultural and food products exported to China meet entry requirements and to assist in resolving unjustified sanitary and phytosanitary issues. The APHIS website provides information for U.S. exporters on plant and plant products, animal and animal products including relevant international regulations.

- The USDA Food Safety Inspection Service (FSIS) has one office in China. The FSIS Export Library for China provides detailed guidelines on eligible (and ineligible) food products for export to China.

**Labeling:** According to the International Trade Administration, incorrect labeling is the most common reason products do not pass customs. All U.S. food exports must include labeling in either English and Chinese or just Chinese. More on this in the FSIS library. Some products also require a CCC mark which must be visible before products can be sold in China. China Customs provide detailed information on tariffs, declarations, certificates and more. Search by product or HS code. See the World Trade Organization’s website for more tariff resources and databases.

- The Chinese 2015 Food Safety Laws are under review so keep an eye out for this update. More labeling and marking information is available from the International Trade Administration.

**China’s Tariff Exclusion:** Retaliatory tariffs make U.S. products less price competitive. The process allowing tariff exclusions on some products from the U.S. is still in place. Though the process can only be undertaken by Chinese importers, U.S. exporters should be aware of the process, tariff rates, and how it may affect pricing. A consolidated GAIN report outlines the process and a consolidated tariff rate table by HS code. In May 2021, China extends tariff exclusion on sorbitol.

**Trademarks and Patents Market Research:** See SECTION II (Protect your brand). In addition, note that trademark copyright can take 18 months to process in China. Plan well ahead before exporting to China to make sure you are as protected as well as possible from intellectual property theft and copyright violations.

**Decrees 248 and 249:** Effective January 1, 2022, Decrees 248 and 249 require foreign suppliers of specific food products to China be registered with the General Administration of Customs of the People’s Republic of China (GACC) prior to having products be presented for customs clearance. FAS China offices have issued several GAIN reports on GACC Decrees 248 and 249. U.S. exporters should consult the most current information in the GAIN system, which provides points of contact at the GACC, to ascertain whether their enterprise needs to register and whether the company can self-register or needs to be recommended for registration by a U.S. competent authority. At the time of publication of
this report, the most current information FAS China can provide on Decrees 248 and 249 is in the following GAIN report: [Decree 248 Single Window Operation Manuals and Tutorial](#).

**SECTION IV. MARKET SECTOR STRUCTURE AND TRENDS**

**Overview of Top Sectors**
- **Meat and Poultry Products** – Consumers have increased demand for protein.
- **Snack Foods and processed products** – Products that meet health and convenience demands are well positioned to gain (tree nuts, dried fruit, and meal replacements such as smoothies).
- **Pet Food** – Pet ownership is growing in short and mid-term with imported pet food carrying cache. 90 percent of pet food is purchased online and foreign exporters fill 70 percent of that quota. This is because foreign pet food is believed to be more nutritional and safer for their pets. By 2023 the market is set to be worth more than [US$67 billion](#).
- **Bakery Ingredients** – Western style bakeries and offerings are expanding as disposable incomes increase. China is expected to exceed [50 billion per year](#) on bakery ingredients by 2025.
- **Dairy Ingredients** - U.S. dairy consumer products (i.e., cheese and infant formula) are highly respected by consumers. China’s demand and consumption of dairy products and ingredients (such as whey permeate) are [forecasted](#) to continue high-level trends.
- **Bulk and intermediate farm exports** - The November 2021 release of the [FAS Quarterly Agricultural Export Forecast](#) provides key data for 2022 exports including an estimated U.S. to China export value of $39 billion. [USDA expects demand](#) for soy and soy products, sorghum, wheat and cotton in 2022.

**Market Opportunities in Hotel, Restaurant, and Institutional Sectors**

Though the pandemic encouraged consumers to do more home food preparation and tourism remains below 2019 levels, the HRI sector is rebounding. Opportunities for high quality foods remain in high-end restaurants in first but also lower tier cities. High quality and value products, especially those with applicability in Chinese cuisines will be popular for mainstream restaurants and institutional dining.

Exporters are encouraged to market to the private and government catering sectors in China to increase brand visibility and highlight the quality, safety, and nutritional benefits of the product(s). Supply competition in the HRI and food processing sectors is highly competitive.

**SECTION V. AGRICULTURAL and FOOD IMPORTS**

**Bulk-Intermediate-Consumer Oriented (BICO) reports** are accessible via [FAS](#).

**Strengths, Weaknesses, Opportunities, Threats (SWOT) Analysis**

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<th>Strengths</th>
<th>Weaknesses</th>
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<tbody>
<tr>
<td>• U.S. exports are seen as high-quality, sustainably produced, and safe.</td>
<td>• High tariffs and bilateral political tensions continue.</td>
</tr>
<tr>
<td>• The United States exports a wide range of products at competitive prices.</td>
<td>• Outside of major cities, supply chains can be inconsistent and fragmented.</td>
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</table>
The United States has a long history of food and agricultural exports to China. Food and agricultural import restrictions can be vague, unjustified, and unevenly enforced. These have been undergoing updates.

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
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<tbody>
<tr>
<td>• <strong>U.S.-China Economic and Trade Agreement</strong></td>
<td>• The Regional Comprehensive Economic Partnership (RCEP) (free trade deal) will come into force on January 1st, 2022, and competitive pricing from other suppliers of China.</td>
</tr>
<tr>
<td>opened the market to new products and expanded some access opportunities</td>
<td>• Supply chain disruptions affect product timing/availability and some consumers perceive that imported products may carry COVID-19</td>
</tr>
<tr>
<td>• Importers can apply for <strong>tariff exclusions</strong> for U.S. exports</td>
<td>• Disposable incomes are improving but consumers show more conservative spending since COVID-19</td>
</tr>
</tbody>
</table>
| • Young and middle-class Chinese consumers are actively seeking out international experiences, products, and higher-quality food products in person and online. |}

**SECTION VII. APPENDICES**

**Appendix 1: USDA FAS Support Programs**

**Market Access Program (MAP)** – Through MAP, FAS partners with U.S. agricultural trade associations, cooperatives, state and regional trade groups, and small businesses to share the costs of overseas marketing and promotional activities that help build commercial export markets for U.S. agricultural products and commodities.

**Branded Program** – Under the Branded Program, eligible companies can be reimbursed up to 50 percent of their approved promotional expenditures in a foreign market including advertising and freight cost of samples. This program is generally administered by the four **State Regional Trade Groups (SRTGs)** with support from USDA.

**Quality Samples Program (QSP)** – QSP enables potential customers around the world to discover the quality and benefits of U.S. agricultural products. The program focuses on processors and manufacturers rather than consumers, and QSP projects should benefit an entire industry or commodity rather than a specific company or product. Projects should focus on developing a new market or promoting a new use for the U.S. product.

**Emerging Markets Program (EMP)** – EMP helps U.S. organizations promote exports of U.S. agricultural products to countries that have, or are developing, market-oriented economies and that have the potential to be viable commercial markets. EMP supports exports of generic U.S. agricultural commodities and products.

For links to these programs, and several other USDA programs not referenced herein, please visit [https://www.fas.usda.gov/programs](https://www.fas.usda.gov/programs).
USDA Endorsed Trade Shows – USDA has multiple endorsed trade shows in China each year. At these events, U.S. exporters have opportunities to meet with importers and learn about the latest market developments.

Appendix 2: United States Department of Agriculture in China

<table>
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<th>Organization</th>
<th>Address</th>
<th>Telephone/Fax E-mail /URL</th>
</tr>
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<tbody>
<tr>
<td>FAS, Office of Agricultural Affairs, Beijing</td>
<td>U.S. Embassy, Beijing, No. 55 An Jia Lou Rd., Chaoyang District, Beijing, China, 100600</td>
<td>Tel: (86-10) 8531 3600</td>
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<td></td>
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<td>Fax: (86-10) 8531 3636</td>
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<td><a href="mailto:AgBeijing@fas.usda.gov">AgBeijing@fas.usda.gov</a></td>
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<tr>
<td>FAS, Agricultural Trade Office, Shanghai</td>
<td>U.S. Consulate General Shanghai, Shanghai Centre, Suite 331, 1376 Nanjing West Road, Shanghai, China, 200040</td>
<td>Tel: (86-21) 6279 8622</td>
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<tr>
<td>FAS, Agricultural Trade Office, Guangzhou</td>
<td>43 Hua Jiu Road, Zhujiang New Town, Tianhe District, Guangzhou, Guangdong, China, 510623</td>
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<td><a href="mailto:ATOGuangzhou@fas.usda.gov">ATOGuangzhou@fas.usda.gov</a></td>
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<tr>
<td>FAS, Agricultural Trade Office, Shenyang</td>
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<td>Tel: (86-24) 2318 1380</td>
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<td><a href="mailto:ATOShenyang@fas.usda.gov">ATOShenyang@fas.usda.gov</a></td>
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<tr>
<td>Animal and Plant Health Inspection Service, Beijing</td>
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<td>Tel: (86-10) 8531 3030</td>
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Appendix 3: U.S Trade Association and Cooperator Groups in China

Note: Representative relationships are for reference purposes only and subject to change

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<tr>
<td>American Pistachio Growers</td>
<td></td>
<td>Fax: 86 21 5466 9609</td>
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<tr>
<td>California Prune Board</td>
<td></td>
<td>86 139 0184 6680 Robin Wang</td>
</tr>
<tr>
<td>Sunkist Growers</td>
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<td>86 136 0187 3080 Roger Zhang</td>
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<td>Food Export Association of the Midwest USA and Food Export USA-Northeast</td>
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<td><a href="mailto:Shengming@sh163.net">Shengming@sh163.net</a></td>
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| States Trade Association  
Western United States  
Agricultural Trade Association  
California Fig Advisory Board  
Wild Blueberry Association  
Cherry Marketing Institute  
California Strawberry Commission  
Ginseng Board of Wisconsin |
|--------------------------|
| National Association of State Department of Agriculture  
Pet Food Institute |
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California Walnut Commission (Trade Portion) |
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U.S. Pecan Growers Council  
Produce Marketing Association  
U.S. Cranberry Marketing Committee |
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U.S. Dairy Export Council  
Potatoes USA  
USA Rice Federation  
California Table Grape Commission |
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<th>Address</th>
<th>Contact Information</th>
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<th>State/Port/City, Location</th>
<th>Representative</th>
<th>Telephone/Fax Email/URL</th>
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<td><strong>BEIJING</strong></td>
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<td>Organization</td>
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Attachments:

No Attachments.