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Kunming Emerging City Market Report

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Report Highlights:

This report is intended to provide a broad overview of the Kunming market for imported agricultural products. It was prepared for a target audience of U.S. exporters, their China representatives, and all other U.S.-China trade specialists with a potential stake in the Kunming market. As such, particular attention is given to those market segments which represent major areas of U.S.-China trade, or areas of potential new trade opportunities.

Introduction

Known as the “Spring City” throughout China for its mild weather and abundant sunshine, Kunming is the capital of Yunnan province and one of four major cities in southwest China along with Chengdu, Chongqing, and Guiyang. Situated about 6,000 feet above sea level in the eastern part of Yunnan, Kunming is the largest city in the province with a population of 6.4 million in 2010. Kunming’s near-tropical latitude in combination with its high altitude gives it a mildly temperate climate which attracts thousands of expats and tourists, as well as makes possible year-round agricultural production.

Kunming at a Glance 2011

Population	6,439,000
Urban population	4,095,000
Rural population	2,344,000
Gross regional product	\$33.6 Billion USD
Gross regional product per capita	\$5,310 USD



Kunming serves as the economic center of Yunnan which is the most biologically and culturally diverse province in China. With a total land area of 394,000 square kilometers and a population of 46 million in 2010, Yunnan borders Sichuan in the north, Tibet in the northwest, Burma in the west, Laos and Vietnam in the south, and Guangxi and Guizhou in the east. Yunnan is famous in China for its cultural diversity, tourism, and rich natural resources. The province is home to 26 of the 55 officially recognized ethnic minorities in China, and with the exception of Inner Mongolia, Yunnan is the most heavily forested province in China with 24.8 million hectares of forested land in 2010.

Economy

Due to its remoteness, Kunming has been an economic backwater in China for most of the last 20 years, though this has changed as China’s trade with Southeast Asia has grown and the central government’s “Go West” policy was implemented. For Kunming, the success of the central government’s “Go West” policy was a boom as companies have looked to Chengdu and Chongqing as primary manufacturing, research, and consumer markets in the West. As the focus has shifted towards Chengdu and Chongqing, Kunming was put on the radar screen of many companies, and the result has been increased investment and economic growth.

Located in the center of China’s agricultural and mineral production areas, Kunming is surrounded by natural resources. The city is being groomed by provincial and national leaders to serve as a main commercial and financial hub for the upcoming China-ASEAN (Association of Southeast Asian Nations) Free Trade Area (FTA).

The ASEAN-China Free Trade Area (ACFTA) is one of the largest free trade areas in the world in terms of trade volume, ranking third only to the European Economic Area and the North American Free Trade Area. As a result of the removal of tariffs on most China-ASEAN trade in recent years, Yunnan’s fruit, vegetable, flower, and tea exports to neighboring ASEAN countries has increased dramatically.

Other key industries of this city include machine tools, automobiles and chemical production. In addition to its

industrial production, Yunnan is home to some of the most popular tourist destinations in China including Dali, Lijiang, Shangri-La, and Jinghong, among dozens of others.

The following table shows Yunnan's major industrial products and their output as they rank among all China regions:

Yunnan Industrial Products Output and Rank in China		
Product	Output	Rank
Refined sugar	1,797,800 tons	2
Cigarettes	35,380,000,000 pieces	1
Coke(processed coal)	16,072,600 tons	7
Sulfuric acid	10,681,900 tons	1
Chemical fertilizer	3,639,700 tons	6
metal cutting machine tools	36,300 units	3
large and medium sized tractors	47,400 units	4
Hydropower	81,412,000,000 kwh	3

Source: China Statistical Yearbook 2011

In 2009, Kunming's increase in FDI was the highest among 30 second and third tier Chinese cities, up 263 percent from the 2005-2007 period.

Foreign Investment

Historically Kunming, more than Chongqing and Chengdu, has had difficulty in attracting large foreign investments because it was a difficult place to export manufactured goods from. While having a better living standard than other second tier cities, it remained largely in the shadows of Chongqing and Chengdu due to its longer transportation times and higher transportation costs to reach markets. However, many companies from the West and Southeast Asia are seeing Kunming as a future market for manufacturing and sales of fast moving consumer goods (FMCG).

To continue its growth and leverage natural resources, Kunming is trying to attract foreign investment in infrastructure, development of agricultural and biological products, development of mineral resources, high technology and environmental production.

Agricultural Production

Yunnan's vast land and geographical diversity make it one of the most important agricultural production bases in China. At year-end 2008, the total area of cultivated land in Yunnan was 6.07 million hectares ranking number 5 in China. Kunming serves as the base and a major production area for Yunnan's flower trade which accounts for more than 70 percent of the total cut flower production in China, and is home to one of the largest wholesale flower markets in Asia. Yunnan is also home to the largest variety of edible mushrooms in China: of the 938 species of edible mushroom in China, more than 800 are native to Yunnan. The following table outlines Yunnan's agricultural production and its rank in China in terms of total sown area and output.

Yunnan Agricultural Production in 2010				
Crop	Sown Area (1,000 Hectares)	Rank	Output(10,000 tons)	Rank
Cereals	3063.4	13	1278	15
Soybeans	579.4	4	79.5	8
Tubers	631.6	6	173.6	6

Oil-bearing crops	333.3	14	34.2	21
Fiber crops	2.6	10	0.6	11
Sugarcane	295.1	2	1750.9	2
Tobacco	438.5	1	99.1	1
Vegetables	671.3	11	1255	NA
Tea	367.7	1	20.7	1
Orchards/Fruit	315.2	16	397.9	19

Source: N.L. Consulates, China Statistical Yearbook 2011, Yunnan Statistical Yearbook 2011

It is important to note that although Yunnan's land devoted to vegetable production does not rank among the highest in China, the province's ability to produce vegetables year-round make it an important part of the region's economy. Yunnan's major fruit crops are banana, apple, orange, pear, grape, pineapple, and peach. Yunnan's banana production ranks number 4 out of the 8 banana producing regions in China.

Infrastructure

At the end of 2011, major infrastructure upgrades were already underway promising to position Kunming as not only a modern subway-equipped metropolis, but also as the most important air and land logistics hub in western China. Kunming's new airport, which is scheduled to open in early 2012, will be the fourth largest in China after Beijing, Guangzhou, and Shanghai with expected annual traffic of 38 million passengers and cargo capacity of 950,000 tons by 2020. Located about 30 kilometers northeast of the city, the new airport will have direct flights to Europe and be surrounded by a modern logistics park connected to the city by a major highway. The new airport is expected to not only boost tourism in Yunnan as it will become a significant flight transfer point in Asia, but also to give Yunnan's flower trade direct access to the European market.

In addition to the new airport, several other major infrastructure upgrades are currently in planning or construction stages:

1. The Kunming Metro officially began construction in 2010 of what is planned to be a 6-line urban rail system covering 162 kilometers.
2. The Kunming Municipal Government has initiated projects to demolish the city's current 114 wholesale markets and move them to newly constructed facilities at least three kilometers from the city center.
3. In 2008, the Yunnan portion of a four-lane highway connecting Kunming to Hanoi was completed. In 2007, the Asian Development Bank approved a \$1.1 billion loan to construct the Vietnamese portion of the highway which is expected to be completed in 2012.
4. New high-speed rail lines are under construction to connect Kunming to Shanghai which will pass through the provincial capitals of Guiyang, Changsha, Nanchang, and Hangzhou cutting travel time from 37 hours to 10 hours by 2015. A Kunming-Singapore high-speed rail line is also under construction and expected to be completed by 2020.

Retail Sector

Competition between foreign supermarkets and local retailers is heating up following the arrival of Wal-Mart and Carrefour prior to 2003 in Kunming. The entry of foreign supermarkets and the improvement of local

retailers have also added diversity to the retail scene.

Kunming Major Retail market at a Glance		
Company	Business Type	Number of Stores
Carrefour	Hypermarket	7
Wal-Mart	Hypermarket	6
Park N shop	Hypermarket	1
Metro	Hypermarket	1
Watsons	Personal care	11
Parkson	Supermarket/Department store	2
Wang Fu Jing	Supermarket/Department store	1
Ginko	Supermarket/shopping mall	4
Zhijia	Convenience store	100+*

* in Yunnan

Source: N.L. Consulates

As is well-known, Carrefour and Wal-Mart are the number one and number two retail chains in China competing for the largest consumer base of price-sensitive shoppers. Metro, Parkson, Wangfujing, and Watson's serve a set of consumers that is less price-sensitive and can afford to place more weight on product quality in their purchasing decisions. Because of their relatively large imported food selection and wholesale purchase options, Metro's customer base also includes expatriates and restaurant kitchens.

Gingko is Kunming's most upscale luxury shopping center home to European fashion brands such as Louis Vuitton, Chanel, Versace, and Hermes, as well as Kunming's most high-end imported food supermarket. This is where Kunming's elite and least price-sensitive consumers go shopping. According to one Gingko supermarket representative, individual customers will sometimes spend \$793 - \$1,587 USD (5,000-10,000 RMB) on imported food products in one visit. Two out of four Gingko supermarkets sell 100 percent imported foods, while the remaining two have expanded their selections to include some high-end domestic products. Gingko is not a supermarket for purchasing most daily staple foods such as vegetables, meat, and rice. Rather it is strictly a luxury supermarket for high-end sweets, snacks, juices, breakfast foods, baby foods, and organics.

Although not on the same level of luxury as Gingko, Golden Eagle is one of Kunming's major luxury shopping centers in the city center and home to European fashion brands such as H&M and Zara. In 2012, Kunming's two Golden Eagle shopping centers will be opening supermarkets. Although specific details on imported product sourcing and offerings are not yet available, these supermarkets are expected to serve a high-end consumer base similar to that of Metro, Parkson, and Wangfujing. Of the major retail chains in Kunming, only Parkshop does not have an imported food section.

Glance at select imported food products

Dairy: Most Kunming supermarkets have very few imported dairy products available. Although cheese, butter, cream and other dairy products are generally available in bulk via distributors to bakeries, hotels, and

restaurants, very little makes it to Kunming in consumer packaging. Only Carrefour and Metro offer relatively large selections of cheese and butter due to their more centralized sourcing strategies.

Beverages: Imported beverages are largely dominated by Malaysia, Thailand, Taiwan, and Korea because of lower production and transportation costs. This is true for most juices as well as iced coffee beverages. Nevertheless, some American products are reported to sell quite well in upscale supermarkets. Apple and orange juices are the best selling juices from the U.S. however these high-end items sell at premium prices of \$32 - \$48 USD (200-300 RMB) per bottle. Other non-juice beverages that are selling well include Starbucks coffee in bottles or cans, and cherry coke.

Nuts: Nuts from the U.S. remain one of the most popular imported foods in Kunming. California almonds in particular have strong recognition and wide distribution in both retail and HRI sectors. Imported mixed nuts are also a popular item. Supermarket nut and snack sections also often have U.S. pistachios. U.S. almonds and pistachios are so common in the market; they are often not labeled as imported. While trade has been successful in enabling distributors and retailers to differentiate U.S. pistachios from others by size, some highlighted concerns over acceptable levels of bleach.

Dried fruits: U.S. raisins also enjoy wide recognition and distribution in both the retail and bakery sectors. In the retail sector, Sunmaid is the most common brand although several others are also available. Sunsweet prunes, although not as common, are also widely recognized and available in some imported food sections. Although not as common as raisins and prunes, dried American blueberries and cranberries are increasing in recognition and popularity. Blueberries are already widely available in the forms of juice and candies. Cranberries are still relatively new to the China market. While most, if not all, Chinese consumers are familiar with blueberries, only the most upscale and health conscious consumers have heard of cranberries. Nevertheless, both imported packaged products as well as domestic applications of imported cranberries are increasing.

Sourcing

Most of Kunming's supermarkets source imported foods from the same local distributors and thus have relatively little variation in product offerings. Of the major retail chains, only Carrefour and Metro have more centralized sourcing channels and thus offer a somewhat different selection of imported foods. Parkson also reported to source some products directly from import agents in Guangzhou and Xiamen.

Perception of imported food products

Most distributors and retailers of imported foods believe that U.S. food products are generally high quality, healthy, and safe. However, most believe that consumers are not very aware of country of origin or brand; rather they pay most attention to packaging. Some customers at high-end supermarkets purchase products and brands with which they became familiar while living abroad.

Hotel, Restaurant and Institutional Sector (HRI) Sector

Yunnan is home to several of China's most popular tourist destinations including Dali, Lijiang, Shangrila, and

Jinghong. In 2010, among all 31 China provinces, municipalities, and autonomous regions, Yunnan ranked ninth in the number of overseas visitors; among all south and southwest China regions, Yunnan ranked second only to Guangdong. Because of its idyllic weather, high air quality, cultural diversity, and proximity to so many travel destinations, Kunming is also home to a large expat population of students, English teachers, journalists, travel writers, investors, and entrepreneurs. Unlike expats in many other Chinese second- and third-tier cities, many Kunming expats are long-term residents that traveled throughout China and Asia and chose to settle in Kunming for its weather and lifestyle. As such, the city has a bustling restaurant and nightlife sector with a large number of foreign-owned restaurants and bars.

Hotels

Considering its relatively international culture and significance as a transfer hub for Yunnan and Southeast Asia tourism, Kunming's luxury hotel sector is surprisingly underdeveloped. At the time of this report, there is not a single international luxury hotel brand operating in Kunming. Most of Kunming's luxury hotels were constructed to host international visitors for the World Horticultural Expo in 1999 and with great expectations and promises regarding the future of tourism in Yunnan.

Luxury Hotels in Kunming

Kai Wah Plaza Hotel

Green Lake Hotel

Bank Hotel

Horizon Hotel

Green Land Hotel

Grand Park Hotel

Golden Eagle Summit Hotel

However, when Kunming's post-expo tourism did not meet expectations, most international investors pulled out. More than a decade later, international luxury hotel brands are finally taking a second look at Kunming:

- In 2011, Howard Johnson opened a hotel in Chenggong county about 20 minutes from Kunming
- In 2012, Kunming's Bank Hotel will finish renovation and rebrand as Crowne Plaza Kunming City Centre
- In 2013, Kunming's four-star Sakura Hotel will rebrand as a Holiday Inn
- On January 9, 2012, the Indian Hotels Group (IHG) announced plans to open Taj and Vivanta by Taj hotels in the Kunming Horticultural Expo Garden
- Sofitel Luxury Hotels will be opening a five-star luxury hotel in downtown Kunming in 2014

Outside of Kunming, the luxury tourism landscape in Yunnan is also changing rapidly:

- In 2009, Crowne Plaza Lijiang opened its doors
- In 2011, Pullman Lijiang Resort and Spa Hotel opened its doors
- In 2012, Anantara Xishuangbanna Resort and Spa will open near Jinghong
- In 2013, Hilton Hotels and Resorts will open a 5-star resort hotel at Fuxian Lake in Fuxi prefecture,

Yunnan

- Banyan Tree Hotels and Resorts, which currently has properties in Lijiang and Ringha near Shangri-La will open two new hotels in Yunnan in 2014:
 1. Angsana Hot Spring Resort Tengchong
 2. Banyan Tree Dali
- Starwood Hotels and Resorts currently has plans to open three new locations in Yunnan
 1. Sheraton Xixhuangbanna Hotel in Jinghong – opening December 1, 2012
 2. The St. Regis Lijiang Resort – opening July 1, 2014
 3. Sheraton Diqing Resort – opening January 1, 2015

While the premature investments leading up to the 1999 horticulture expo are an important factor in defining Kunming's current luxury hotel market, it is also important to recognize that Kunming mainly serves as a transfer hub for tourists traveling to their final destinations.

Products

Although distributors and hotels are very aware of what products and brands they use, they are often only vaguely aware of production origin. Foreign brands that now have production bases in China using domestic ingredients are often mistaken as imported. Some key examples are McCain frozen potatoes, Nestle milk and cream, and Rich's Whip Topping.

Based on contacted interviews with the above hotels and distributors in Kunming, imported food products selling in the highest volume include the following:

Product	Origin
Milk powder (for baking)	U.S., Canada
Cream (unflavored)	New Zealand, Australia, Denmark, U.S.
Cream (flavored)	Japan
Nuts: almonds (slices, chips, powder)	U.S.
Jam	Switzerland, Belgium, U.S.
Non-dairy cream	U.S.
Raisins, dried cranberries	U.S.
Butter	New Zealand, Australia
Cheese	New Zealand, Australia
Chocolate(baking, drinking)	Belgium, France, Switzerland, U.K.
Frozen Seafood	New Zealand, Australia, Norway, Thailand, Japan, U.S.
Turkey (winter holidays)	U.S.
Chicken	U.S., Brazil
Beef	Australia, U.S.
French fries	U.S.
Mustard	France, U.S.
Vinegar	Italy

Source: N.L. Consulate , 2012 . survey of luxury hotels and distributors

Opportunities & Challenges for Select Agriculture Products

Wine: The Kunming wine market is already relatively well-developed and competitive compared to other emerging city markets in China. Although this may help to ease an initial entry in to the market, it may make it more difficult to establish a large and growing customer base. Nevertheless, with the opening of the new airport and the promising development of Kunming's HRI sector, there are should still be plenty of opportunities for companies that can afford to take aggressive and long-term marketing strategies. Moreover, such a competitive market also creates opportunities for niche strategies. As the date of this report, ATO Chengdu is not aware of any wine distributor in Kunming that specializes specifically in American wines.

The biggest challenges to U.S. wines in Kunming are:

1. A lack of marketing support comparable to France or Australia
2. Higher prices compared to Australia and Chile
3. Lack of recognition among consumers due to late entry in to the China wine market (in southwest China, U.S. wines account for about 1 percent of the market)

Opportunities for U.S. wines in Kunming include:

1. A relatively developed wine market
2. A mild climate comparable to California and Southern Europe
3. Promising growth of Kunming and Yunnan's HRI sectors
4. Large expat population

Meat, Poultry, and Seafood: Unlike the markets for other imported foods, imported frozen meat products in Kunming are generally not exclusively destined for high-end hotels, western restaurants, and retail outlets. In fact, many traders of imported frozen meats are only vaguely aware that the products are from abroad. These products are able to enter the Kunming market because of their competitive pricing, and are often consumed in typical Chinese restaurants, hotels, and street barbecues. Imported frozen meat products sold in the highest volume include chicken parts, pig feet, and prawns. Because chicken feet are not consumed domestically in the U.S., they are the cheapest and highest volume frozen meat import. Turkey is imported in small quantities only during the Thanksgiving and Christmas holiday seasons to meet demand of the HRI sector.

The largest competitor for U.S. poultry comes from North China, which has abundant poultry farmland and production sufficient to supply the southwest China market. However, logistics fees for transport from North China to Kunming are around 1,000 RMB per ton; While logistics fees for transporting imported poultry from Guangzhou (a major import destination for U.S. poultry) to Kunming is around 350 RMB per ton. It is largely this logistics issue that guarantees a good market share for U.S. poultry in Yunnan.

Floriculture: Yunnan is the most significant flower producing province in China accounting for about 70 percent of the country's total cut flower production. The majority of flowers produced in Yunnan are for domestic consumption, mainly in the first tier cities of Shanghai, Beijing, and Guangzhou. About 25-30 percent of flowers

sold in the flower auction center are for export to other Asian countries such as Japan, Korea, Singapore, and Thailand as well as to Australia.

Flowers produced for export must be grown from imported bulbs as those grown from domestically produced bulbs do not meet import standards of other countries. About 70-80 percent of imported flower bulbs come from Holland while Chile dominates the remaining 20-30 percent.

Although no bulbs are imported from the United States, some U.S. flower seeds were available in consumer markets. Dutch companies have dominated the imported flower bulb market and entry by American companies not only would require a high quality product at competitive prices, but also effective local marketing support to test and demonstrate the quality of the imported bulbs. Some flower producers use equipment imported from the United States. Such as spray/mist nozzles and pumps.

Feed: Yunnan is a major livestock and meat producing province in China. At year-end 2010, there were 9.2 million heads of large animals in Yunnan ranking number 3 in China after Sichuan and Henan. Cattle and buffalo account for most large animals in Yunnan with its 7.45 million heads also ranking number 3 in China. Yunnan is also a major producer of hogs: at year-end 2010, there were 27.7 million hogs in Yunnan ranking number 4 in China. Such a large number of livestock makes Yunnan one of the major consumers of animal feed in China. Kunming serves as the base for many company headquarters serving the Yunnan feed industry.

Although Yunnan is a major livestock producer, it is also one of China's major producers of corn and soybeans, the main ingredients in animal feed. Furthermore, because of Yunnan's location far inland from Guangdong, high transportation costs make the use of imported ingredients somewhat prohibitive. Nevertheless, one representative from the Department of Agriculture had heard of the Kunming branch of CP Group, one of the largest feed manufactures in China, having used some imported ingredients.

Vegetable Seeds: Because of its mild year-round climate and abundant natural resources, Yunnan is one of China's main commercial production bases for vegetables. In 2010, the total sown area of vegetable crops in Yunnan was 671,300 hectares and output of vegetable crops reached 12.5 million metric tons.

With such vegetable production volume, it is not surprising that there is a large market for vegetable seeds and seedlings, especially for vegetable varieties that are not indigenous to China such as spinach, broccoli, asparagus, tomato, celery, and lettuce. Although some vegetable producers grow directly from seeds, there is also a large market for high quality vegetable seedlings, a large portion of which are grown from imported seeds.

Conclusions & Recommendations

The purpose of this report has been to provide a broad overview of a large and complex market. Its intent is to provide a starting point for market entry by describing the general situation, and introducing the major players in several key market segments. After reading this report, one should have a basic idea of the size of the markets for imported products in the Kunming retail, HRI, wine, and fresh fruit sectors, as well as what competition and marketing strategies currently exist. It is important to understand that what is successful in one Chinese city will not necessarily be successful in others. One must avoid relying too heavily on simplistic approaches to evaluating a city's marketing potential such as income levels, population, or other common

statistical indicators. In China, two cities with similar income levels and population sizes may have widely varying cultures and consumer behavior. Compared to other second and third tier Chinese cities, Kunming is already relatively competitive in terms of the number of distributors specializing in imported products. This provides both opportunities and challenges which must be carefully weighed depending one's product, marketing budget, and short- or long-term goals.

Market Research

Upon deciding to enter the Kunming market, it is highly recommended to first conduct market research on the particular product and its relevant market segments. ATO Chengdu will be able to offer advice on the best approach to conducting such research as well as help in identifying companies able to provide local assistance. Although the benefits of market research are sometimes not immediately tangible, those equipped with detailed knowledge of the Kunming market will be more successful in cooperating with local companies, as well as more able to pursue effective marketing strategies than those without such knowledge.

Know your Customer

Although market research is an important starting point for entering the Kunming market, it is absolutely not a substitute for first-hand experience. Those considering doing business in any city in China should first visit a number of cities in order to develop a frame of reference for their observations and expectations. Visiting only one or two cities is likely to obscure more than it reveals about China in general and other Chinese cities in particular. Kunming's sales venues for imported products are different in number and character than those in other places. Visiting the final sale venues for one's product is necessary to understand what marketing strategies may be most effective, as well as to what extent dealer and consumer education may be necessary.

Choosing a Local Distributor

Choosing the right local distributor for one's product or promotional activity is essential for achieving one's marketing goals. In Kunming's retail, wine, and fresh fruit sectors, there are a number of distributors each with their own distinct sales channels and levels of experience. Some sell to Wal-Mart, while others sell to Gingko; some can directly import, while other cannot; some have extensive experience cooperating with foreign companies or trade associations, while others have none. In addition to a distributor's demonstrated capability to market their products, one must also gauge each distributor's interest in marketing the particular product before establishing a partnership. For kitchen ingredients and bakeries, there are fewer distributors and thus one must be careful in how the distributor is approached. In all of China, face-to-face meetings are an absolute necessity in conducting business and Kunming is no exception. Connections are important not only for their practical application, but also as a part of the local culture. If possible, directly contacting distributors with which one has had no previous contact should be avoided. Meetings with potential business partners will always be more successful if an introduction can be provided by a well-respected mutual acquaintance.

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