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South China swine industry - a goldmine for U.S. hog breeders

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Report Highlights:

Sales in 2008 of U.S. purebred breeding swine in South China were brisk. Supply shortfalls, driven by increasing demand and decimation of animals due to an outbreak of blue ear disease in 2006, as well as governmental support of the swine industry to increase production and tap rural markets spell opportunities for U.S. breeders. Their supply of healthy, strong and productive U.S. purebred stock to China ensures top quality generations to come. This report examines production and market trends to uncover what the future holds for American hog breeders.

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Trade Report
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[CH]

South China's market in 2008 for U.S. purebred breeding swine was brisk. Supply shortfalls, driven by increasing demand and devastating decimation of animals due to blue ear disease (officially known as Porcine Reproductive and Respiratory Syndrome or PRRS) in the latter half of 2006 and the first half of 2007; governmental support of the swine industry to increase production and tap rural markets all spell tremendous opportunities for U.S. hog breeders whose supply of healthy, strong and productive purebred animals to China ensure top quality generations to come. However, just how much opportunity depends on a mix of market factors.

Swine production and market situation at a glance

To understand the demand for swine, we need to look at the situation for China as a whole. China is the world's largest swine producer and pork consumer. South China's Guangdong province, with the adjacent Hong Kong and Macao, is China's largest pork consumer whose demand falls short of supply. Guangdong hog farmers and those in neighboring provinces such as Hunan, Guangxi and Fujian have ramped up production. In 2006, China produced 605 million head which translates to 46.5 million metric tons of pork. However, China's pork production declined eight percent to 42.9 million tons due to PRRS outbreaks.

In response to worsening global financial crisis, China's feed grain prices slid further. In November 2008, the Chinese government announced a RMB4 trillion (US\$586 billion) stimulus plan to boost the economy and domestic consumption. An optimistic industry source believed these factors could help the Chinese swine industry fully recover by the end of 2008 and continue to grow in 2009.

The Chinese love pork. Pork generally accounts for 65 percent of meat consumption, 20 for poultry, 8 for beef, 5 for lamb and 2 for other meats. In rural areas, over 75 percent of consumed meat is pork. On average, a Chinese urban resident annually consumes nearly 90 pounds of meat while a villager consumes 42 pounds. Both should grow as the Chinese economy improves.

Post was informed in May 2008 that on large farms, it cost US\$143 for feed and US\$50 for other costs such as labor, electricity, equipment maintenance and animal health products to raise a marketable pig (220 pounds) from birth. The wholesale price at that time was US\$257/head leaving a profit margin of US\$64/head. It costs US\$7 to slaughter a pig. At retail, a good cut of lean pork was sold at US\$2/pound. The most common cut are ribs that sell for a few cents less per pound.

By contrast, due to the economic slowdown, feed prices have since declined. In March 2009, it cost US\$132 to feed a pig and US\$50 per head for other costs. However, the pig's wholesale price plummeted to US\$184/head because of abundant pig supply and low pork demand. It left almost no profit to pig farms.

China's pork market can be divided into regional hubs supplied by swine production bases:

Regional Hubs	Served by specific swine producing province(s) for designated consumer market(s)
North	by Liaoning producing for the Beijing market
Central	by Henan and Shandong for the local market and exports to Korea and Japan
East	by Jiangsu for the Shanghai market
West	by Sichuan (Chengdu and Chongqing) for the local market and Guangdong
South	by Hunan, Jiangxi, Fujian and Guangdong for the local market as well as Hong Kong and Macao

The South China hub consumes the most pork. For example, Guangzhou normally consumes 10,000-12,000 head, and there are over 40,000 head live pigs shipped to Hong Kong and Macao on a daily basis. It means the three cities with a total population of 18 million consume over 18 million head yearly.

From January to June of 2008, Hunan produced 42.7 million head, an increase of 7.9 percent from 2007, ranking first in South China and second in China overall; Guangxi reared 22 million head of commercial pigs and 3 million reproductive sows; and Fujian produced 13 million head.

For 2008, Guangdong raised an estimated 2.65 million sows and 23.80 million pigs as well as supplied 24.32 million head to market and bought 20 million from surrounding provinces to feed 125 million consumers (95 million local residents, 30 million migrants and visitors). There is a market demand for 500,000-600,000 head of breeding parent pigs. It presents a niche market for high quality imported U.S. purebred Great Grand Parent (GGP) swine.

Importation of U.S. breeding swine

In 2008, China witnessed an explosive increase of purebred swine imports, mainly from the United States.

According to *China Customs* data, in 2008, China imported 11,613 head valued US\$18.2 million, a stunning 360 percent increase from 2,506 head valued US\$4.1 million in 2007. Among all imports, the US accounted for 61 percent: 7,086 head valued US\$11.8 million.

China's import of breeding purebred swine by country

Quantity unit: head; HS code: 01031000, live pure-bred pig

Rank	Country	CY 2005	CY 2006	CY 2007	CY 2008
1	United States	1,892	1,038	194	7,086
2	Canada	1,032	503	1,780	3,876
3	Denmark	0	682	0	126
6	United Kingdom	0	266	262	525
7	France	314	0	0	0
9	Australia	0	0	270	0
	Total	3,238	2,489	2,506	11,613

(Source: *World Trade Atlas, China Customs*)

The chart shows China has completely shifted sourcing from Europe to North America. In three to five years time, given continuity in breeding and genetic selection, the North American purebred should dominate the China market if there are no swine disease outbreaks in the States or Canada. Furthermore, in 2008, the trend has been in favor of the United States over Canada.

Areas	Main importers
North	Beijing, Tianjin
Central	Qingdao
East	Shanghai
West	Chengdu, Chongqing
South	Guangzhou, Shenzhen and Haikou

In 2008 (January through November), South China was the largest importer: Guangzhou and Shenzhen imported 3,766 head accounting for 32 percent of China's total import.

China's import of breeding purebred swine by district (city)

Quantity unit: head; HS code: 01031000, live purebred pig

Rank	District	CY 2005	CY 2006	CY 2007	CY 2008
1	Guangzhou	0	0	270	2,902
2	Beijing	894	356	598	2,180
3	Chongqing	0	0	0	1,842
4	Shenyang	0	0	0	929
5	Chengdu	0	0	0	866
6	Shenzhen	1,314	930	0	864
7	Nanjing	0	0	0	600
8	Shijiazhuang	0	0	0	525
9	Nanchang	0	0	0	505
10	Shanghai	1,030	521	194	400
11	Tianjin	0	160	0	0
12	Harbin	0	0	628	0
13	Qingdao	0	0	816	0
14	Haikou	0	522	0	0
China total		3,238	2,489	2,506	11,613

*(Source: World Trade Atlas, China Customs)**Note: Highlighted districts are in South China covered by ATO Guangzhou*

The most recent import from the States was a shipment of 608 head to the Guangzhou airport on December 1, 2008. After this shipment, the U.S. exporter claimed that it would ship 2,500 head before May 2009 to China. This indicates that the trend for Chinese to import U.S. purebred swine will continue into 2009.

To better understand China's future demand for imported breeding swine, it's necessary to take a look at swine production and market trends.

Swine production and market trends**Swine production is poised to grow; more large commercialized hog farms emerge**

Given pork price volatility and outbreak of epidemic swine disease, increasing numbers of backyard farms have closed in rural areas. Industrial development and urban expansion offer farmers better paying jobs and lure them from the farm. The transition to commercialized production takes time and investment as well as causes temporary supply shortages because backyard farms produce 70-80 percent of the pork.



Chartered plane full of U.S. breeding swine at the Guangzhou Baiyun International Airport, December 2008



*Pigs just unloaded from the plane
(Source: www.sinofarm.cc)*

South China is taking the lead towards commercialization. For example, Fujian has 125 hog production bases producing 10,000 head each; 372 bases producing 5,000 head each; and 725 producing 3,000 head each. The transaction is endorsed and financially sponsored by the central government that provided funding of RMB65 million (US\$9.6 million) and the provincial government that provided RMB1.2 million (US\$176,471) yearly in the past two years.

Commercial finisher pig farms are categorized by number of reproductive sows and finisher pigs:

	Reproductive sows (head)	Finisher pigs (head)
Large farm	Above 600	Above 10,000
Medium farm	300-600	5,000-10,000
Small farm	120-300	2,000- 5,000

A Guangdong farm recently built a single farm capable of producing 65,000 head a year. There is an ambitious plan in Hunan to build a giant base for an annual production of 10 million head. They both have access to favorable bank loans backed by local government.

The Guangzhou municipal government has pledged to boost its annual swine production from the current 2.3 to 2.6 million head before 2010, when there will be at least 50 large 10,000-head farms in the suburban area. In the Huadu district of Guangzhou, an ongoing project invests RMB150 million (US\$22 million) to build a farm, equipped with imported U.S. and Canadian barn mechanic systems, aiming to produce 150,000 head yearly in 2010. This farm has hired an experienced U.S. swine specialist to act as the General Manager on contract.

These trends should encourage demand for high quality imported breeding pigs.

Farms get more specialized

Besides getting larger, hog farms are becoming more specialized. Most used to be farrow to finisher farms that took care of a pig's entire life cycle. However, focus is now on breeding piglets raised to 40-60 pounds, then selling to feeder to finisher hog farms that specialize in rearing hogs to market size (200-220 pounds). They no longer keep sows and nursery facilities on the premises. This trend helps spur production, reduce management costs, lower hog prices and boost breeding pig exports to China when more large breeding farms establish.

Vertical integration starts; giant integrated hog operations form

According to a U.S. swine specialist, China is at the developmental stage similar to where the U.S. industry was in the late 1980's. Vertical integration has begun, and more giant integrated hog operations are being established.

In Guangdong and Hunan, such operations are emerging to integrate hog farms (breeding as well as finisher farms), feed mills, animal health related products (veterinary medicines and vaccines), logistic-related facilities (cold storage and trucking), slaughter plants and meat processing. Some even run retail and restaurant chains as well as real estate businesses. Some are listed in the stock market, such as the *Hunan New Wellful Co., Ltd.* that supplies 380,000 head live pigs to Hong Kong and Macao yearly.

Another is *Wens*, headquartered in Xinxing county of Yunfu, Guangdong. As the number one broiler and swine producer in China, *Wens* supplied 530 million birds and 1.82 million pigs in 2007, according to interviewed *Wens* management. It can do this because *Wens* signs contracts in 18 provinces with local farmers to raise broilers and pigs. It breeds and provides farmers with young birds and animals, as well as feed (2.93 million tons in 2007, and 3.91 million in 2008) and health products (veterinary medicine such as vaccines for bird flu and

swine blue ear diseases). The company stated it reached production of 2.54 million pigs by the end of 2008.

These entities are willing to pay for high quality purebred hogs. Both above mentioned companies imported breeding pigs from the US and Canada in 2006.

Foreign investors interested in China's swine industry

According to media reports, *AgFeed Industries Inc.*, a NASDAQ listed company headquartered in Jiangxi, recently invested US\$100 million to purchase 30 commercial hog farms with a total annual production of over 650,000 pigs in Jiangxi, Guangxi, Fujian, Hunan, Shanghai, Jiangsu and Zhejiang provinces. Because *AgFeed* is partially owned by *Goldman Sachs*, its purchase was widely reported by the media. *Goldman Sachs* has also invested in *Shuanghui*, the largest Chinese meat processor. Because *AgFeed* is also China's largest pre-mix feed miller that produces 300,000 tons valued US\$193 million yearly, another foreign invested giant hog operation is forming.

Deutsche Bank Group launched a fund in September 2006 to invest in China's breeding business. At present, China's live pig breeding and pork processing industry maintains low concentration. The top three meat processing enterprises share only 3.7 percent of national market. According to analysts, international capital players could profit from acquiring and integrating Chinese live hog breeding/rearing enterprises, feed mills and meat slaughtering and processing plants. These foreign invested or joint venture farms will be certain to seek inputs, i.e., breeding swine from the States to facilitate rapid development in China.

Live pig futures and national level stocks

In 2009, the Chinese government plans to launch live pig futures at the *Dalian Commodity Exchange* in a bid to curb price fluctuations and prompt integration. According to an interviewed Hunan company, research and preparation have begun.

Another effective measure is to establish national pork stocks to store frozen pork to ensure market supply. After the blue ear outbreak and severe supply blockages caused by a snow storm in South China in the spring of 2008, the stock system has been implemented.



Importer, Chinese CIQ and USDA officials greet U.S. breeding pigs in Guangzhou with a ribbon cutting ceremony
(Source: ATO Guangzhou)



An imported U.S. piglet newly arrived in Guangzhou
(Source: Yitao Legend Liang, used with permission)



A truck loaded with imported U.S. pigs
(Source: ATO Guangzhou)

China wants to ramp up breeding cooperation nationwide but still has a long way to go

China wants to establish a national swine breeding system to improve overall production and performance. For instance, Guangzhou has held boar contests/auctions twice annually for the past 13 years. On December 18, 2008, 14 contestant boars were auctioned, and the champion, a large white boar, was sold for RMB13,400 (US\$1,971). To encourage swine breeding, Guangdong subsidizes breeders RMB40 (US\$5.88) for each reproductive sow and RMB10 (US\$1.47) per dose of boar semen (two doses per artificial insemination).

In December 2008, a Chinese swine specialist stated that given the current swine population, assuming 20 piglets per sow per year and 30 percent sow culling rate, the manager estimated 19,000 great grandparent (GGP) breeding pigs, among which 3,000 would be imported (from all sources), are needed every year.

The same specialist believes artificial insemination for swine by frozen semen is still premature. It requires a system of technologies of frozen semen transportation, storage, administration and precision in injection. To observe and identify sows in heat is another challenge for breeders. China still has a long way to go before it can establish a national system of swine breeding which requires a large genetic pool. It means, in a foreseeable future (say, five to ten years), China still needs to rely on imported purebred swine to expand swine production.

The following case studies reflect the current situation and future trends in South China swine production and importation of breeding swine.

Case Studies

Case I: Large shipment (1,000 head and above) for experienced farms

Guangdong Guang Sand Puo Piggery Farm Ltd., a veteran and well known swine producer in Guangdong, spent US\$ 4.3 million for the total 1,650 head order, which includes purchase, transportation and quarantine costs, to import five varieties of boars and gilts, including Duroc, Landrace, Yorkshire, Hampshire and Pietrain. Through a U.S. agent, the pigs were sourced from breeding farms in Illinois, Ohio, Iowa, Missouri, Nebraska and Minnesota. Their crossbred offspring will have preferred characteristics such as fast growth, fertility, high ratio of lean meat and good pork flavor.

This importation received support from local government. In May 2008, top officials from *Guangdong Entry-Exit Inspection and Quarantine Bureau* and *Guangdong Department of Agriculture* traveled to the States with the company's buyer team to assist with selecting piglets at farms.

On June 11, 2008, the late evening arrival of many truckloads of swine capped years of planning and was greeted with jubilation by company management and government officials, replete with giant banner, exploding confetti and ribbon cutting ceremony. Company management were pleased with livestock quality, so much so that they made a request of the Chinese government to allow purchase of up to 200 more than the 1,500 originally planned for. Selected from five of the best U.S. breeding farms and quarantined for two months in the States, the pigs (44-154 lbs., age 3-8 months old) arrived by *Northwest Air* cargo plane in Guangzhou after a 24-27 hour transatlantic flight from Chicago via Tokyo.

With military precision, giant crates of pigs were hoisted onto longer trucks, led by police escort, and preceded on a two-hour journey to a newly constructed farm worth US\$8.6 million in Guangning County, approved to serve as temporary quarantine and segregation

facility. As extra precaution, over two dozen veterinarians from Guangdong as well as Guangzhou and Zhaoqing *China Inspection and Quarantine's* (CIQ's), were on hand to take blood and urine samples from each pig over a record two to three days. After a satisfactory 45 days of quarantine, these U.S. pigs were exempt from China's "birth control" policy and allowed to produce as many offspring as possible. The farm aimed to annually produce 60,000 head, among which 20 percent will be reserved as breeding pigs to sell piglets and genetic products (boar semen) to other farms nationwide. This total order of 1,650 head for American purebred breeding swine was China's second largest ever after *Guang Sand Puo's* purchase of 1,800 head in 1985.

Case II: Large shipment (1,000 head and above) in Hunan

Pig production is another pillar agricultural industry in Changsha. The area raises 4.32 million pigs and provided 8.32 million heads to market in 2007. In addition to local consumption, the pig also supplies to Guangdong, Hong Kong and Macau market.

According to an interviewed pig farm manager, Guangdong is the biggest consumer which buys 25 million live pigs annually from neighboring provinces such as Guangxi, Jiangxi, Hunan and Sichuan province. Hunan swine farmers supply pigs, including fattened pigs and piglets to Guangdong, Hong Kong and Macau. The province's statistics reported 2.82 million head of piglets sold outside the province.

Swine farmers in Changsha and Hunan province prefer to source genetic stock (crossbred offspring of U.S. *Duroc* boar, *Yorkshire* sow – a.k.a. "*Large White*" – and *Landrace* sow) from the US, because of enviable appearance, strength, rapid growth rate, high fertility, disease resistance and adaptability. In particular *Yorks* have a big cavity to raise litters, have good bone structure, are good mothers and are more docile. *Landrace* have good maternal characteristics. *Duroc* boars grow fast, and need less feed to produce meat.

In 2008, one of the largest swine company in Hunan province brought in 600 head of best quality breeding swine from the US. The company also contracted the U.S. supplier for farm facility design, ventilation system and waste treatment technologies. A total of US\$17.65 million (RMB120 million) investment has been pooled for the purchase, transportation, quarantine and farm construction and installation of facilities.

(Note: Abstract from upcoming ECM Changsha Gain report by Vivian Xian.)



A large barn under construction to receive 1,200 U.S. pigs in Hunan



Various processed pork products, some in gift boxes

(Source: ATO Guangzhou)

Case III: Medium shipment (400-600 head or a cargo jet load)

In 2004, in Guangxi, a Nanning suburban breeding farm imported an air shipment of 268 U.S. breeding swine. In 2007, it spent another US\$2.0 million importing 460 U.S. purebred pigs (Duroc, Yorkshire and Landrace breeds). Duroc boars are valued here for their fast growth rates and are crossbred with either Yorkshire or Landrace sows that have higher fertility rates. The same farm plans to import more from the States in 2008.



Group of crossbred piglets
(Source: Kexinyuan Company)

Post was told U.S. crossbred offspring here are well received locally because of their appearance, rapid growth rate, high fertility, disease resistance and adaptability. Chinese pig farmers prefer strong rear legs to support body weight and wide shoulders which suggest higher ratios of lean meat.

It generally takes 180 days and 419 to 485 pounds of quality feed for these U.S. crossbreds to reach market weight of 100 kilos (220 pounds). In contrast Chinese breed equivalents require 210–240 days and more feed.

Industry sources say U.S. sows typically produce 12 piglets which show good levels of resistance to common diseases or even recent devastating outbreaks of blue ear that usually cause high piglet mortality rates. In comparison Chinese sows are said to have up to 15 piglets, but growth is slow. They also have lower standard reproductive performance (such as fewer surviving piglets per delivery and poor lactation) and higher levels of stress due to poor environment such as poor ventilation and hygiene.

Reports of U.S. crossbred piglets have been positive as they adapt quickly to local climates, living environments and feeds. At 90 days, piglets are at its best physical shape and sold to large scale commercial farms at this time.

Given China's growing demand for improved livestock production, importers can apply to the *Ministry of Agriculture* for tariff exemptions on imported animal genetic products (such as live breeding animals and frozen semen/embryos). However, swine industry importers generally prefer live animals, mainly because they care more about visual appearance over pedigree records. (Note: Modified abstract from the ECM Nanning GAIN report CH7616, page 8-9).

Case IV: Small shipment (100-200 head)

Swine production is the most important agricultural industry in Guilin. Guilin raises 2.5 million pigs and provides 420,000 head to market monthly, No. 1 in Guangxi that produces over 41 million pigs yearly and ranks the sixth nationwide. Local government's data suggest Guilin consumes 135,000 head monthly. That means about two-thirds of the Guilin swine annual production, over 3.4 million, supply outlying markets. Guangxi annually supplies over 10 million including fattened pigs and piglets (small pigs aged 90 days), mainly to



Looking forward to farrowing 12 piglet litters
(Source: Kexinyuan Company)

Guangdong, partially to Hainan, Hong Kong and Macau.

Guilin swine farmers prefer U.S. sourced genetic for the same above mentioned characteristics.

One recent example is a joint venture project involving the *Guilin Livestock Department*, a local large swine farmer and a leading American breeding stock exporter who imported 165 head of best quality U.S. breeding pigs, preferably offspring of champion pigs in past contests. A total of RMB5 million (US\$700,000) has been pooled for the purchase, transportation, quarantine and farm construction/installation of facilities.



Facilities under construction to accommodate U.S. pigs in Guilin. They enjoy a good view of the famous karst (at right)
(Source: ATO Guangzhou)

ATO/GZ assisted a delegation consisting of livestock officials and a swine farmer to visit the States to select purebred piglets in March 2008. Consequently, 165 pigs were airborne to Tianjin in June and quarantined at one of four certified national segregated quarantine farms for imported live animals. After inspection and monitoring for 45 days, pigs were released and trucked to Guilin in August. The manager gave very high marks on overall quality and health condition and expressed extreme confidence in the future market for the decedents of these U.S. boars and gilts.

Some would wonder why the Guilin swine farmer didn't use the quarantine farm in Guangzhou to save logistic costs. The answer is that the Guangzhou farm had been fully booked by other swine importers until 2009. It proves a recent boom of investment in the swine industry because of the lack of pork supply and escalated prices, attributed by the epidemic of blue ear disease.

(Note: Abstract from the ECM Nanning GAIN report CH8604, page 13-14, and updated)

Trade tips and advice for U.S. breeders

➤ **A good agent is key**

The above said Guangdong hog raising company originally planned to buy from another country source rather than buy American. The deal fell through because the agent did not bring the buyer to visit top farms to select the best possible pigs as promised. A U.S. agent seized the opportunity to show this buyer around quality farms in corn belt states. This million dollar deal was closed after the buyer happily identified a number of supplying farms in six states.

A U.S. breeder has a Chinese agent set up in China. In this way, the agent managed to coordinate reps from Chinese farms to travel to the States to select pigs which could be later shipped back to China on a chartered plane. It saved on transportation and other costs.

➤ **Logistics, expect the unexpected**

Be prepared for flight cancellations

Last year Post received an inquiry from a U.S. swine exporter regarding China's inspection and quarantine requirements on a transshipment of U.S. swine via Hong Kong

to Guangzhou. Post confirmed with CIQ Guangdong that inspection and quarantine requirements on transshipments to China remain the same as those for the direct shipment, though the transshipment would have to meet requirements of the transiting port, i.e., Hong Kong in this case. ATO Hong Kong provided prompt guidance about Hong Kong authority requirements. According to the exporter, *China Southern Airlines*, the air freight service provider, suspended cargo service of direct shipments from Chicago to Shenzhen in Guangdong from May 14 to early September, due to the poor economy and soaring fuel prices. Thus, the only logistics option was to transship via Hong Kong to South China. The exporter was concerned about inspection and quarantine requirements.

Be prepared for flight delays

Most U.S. flights have a pit stop in either Japan or Hong Kong before arriving in South China. Delays may occur due to weather or mechanic problems. There should be a contingency plan to ensure water and feed supply, ventilation, hygiene and other needs during possible flight delays. After all, pigs don't know how to press the call button for flight attendants.

➤ **Provide an on-board veterinarian**

An on-board veterinarian could play a critical role in ensuring air passengers' well being. If any death occurs on board, the subsequent quarantine process could be prolonged and complicated. With professional attention, such risk may be averted or reduced.

➤ **Break the bottleneck**

It is obvious that the four national quarantine farms cannot accommodate all imported live animals. This results in a bottleneck, thus curbing swine imports. The U.S. industry could look into cooperating with Chinese CIQ and local swine industry to build certified quarantine farms at critical locations.

➤ **Cooperate with Chinese farms to improve farm facilities, management efficiency and breeding programs**

Besides breeding pigs, Chinese farms also look for U.S. inputs such as barn equipment, veterinary medicine, management know-how and breeding technologies. U.S. swine breeders could look into various ways to cooperate or form joint ventures with Chinese counterparts. It fortifies business relationships and opens up alternate revenue sources.

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