

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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POLICY

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## **China - Peoples Republic of**

### **Food Service - Hotel Restaurant Institutional**

#### **Food Service Industry Sector Overview - China - 2018**

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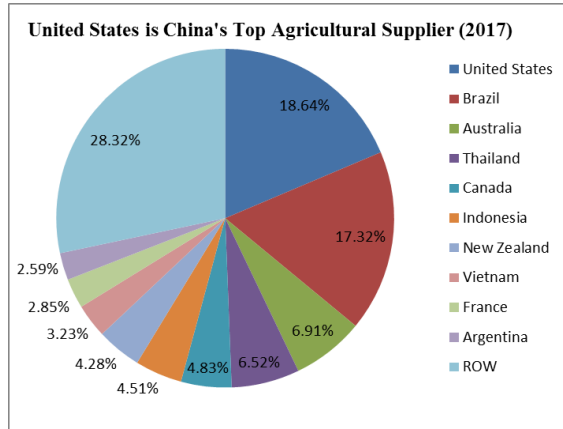
FAS China staff

**Report Highlights:**

China's Hotel, Restaurant, and Institutional (HRI) sectors recorded USD \$583 billion in sales revenue in 2017, a 10.7 percent increase from the previous year. Regional diversity greatly influences the consumption trends, yet food safety is of the greatest concern. U.S. agricultural products generally enjoy good reputation for their quality, safety, stable supply and consistency. U.S. exporters should consider marketing strategies carefully and plan to offer more education to the industry and consumer whenever feasible.

## Executive Summary

In 2017, China imported approximately US \$24.1 billion of U.S. agricultural products, a more than ten-fold increase since China's accession to the World Trade Organization (WTO) in 2001. China is a net importer of U.S. agricultural products.



Source: Global Trade Information System (GTIS)

## China's Imports of Consumer-Oriented Products

The United States was China's second largest consumer-oriented product exporting country in 2017. According to the USDA's Global Agricultural Trade System (GATS), the United States exported US \$2.4 billion in consumer-oriented products to in 2017.



Source: Global Trade Information System (GTIS)

## Food Service Industry – China Overview

China's Hotel, Restaurant, and Institutional (HRI) food sales reached US \$583 billion in 2017. The Chinese food service industry is comprised of 26,300 registered companies (\*companies with annual revenue over \$315,000) and many small family-owned foodservice restaurants. As disposable income levels increase, consumers in China are demanding higher quality food products to be served in the HRI sector. Healthy eating has become a strong trend among the middle and upper-classes.

## SECTION I. MARKET SUMMARY

### China Macroeconomics

**Population:** 1.38 billion and growing; largest in the world (Source: World Factbook)

**GDP (in PPP terms):** \$12 trillion (in 2017); largest in the world; largest in Asia (Source: World Factbook)

**Per capita income:** \$8,827 (in 2017), with a growing middle class (Source: World Bank)

#### Agriculture:

- Accounts for 8.3 percent of China's GDP
- Accounts for 27.7 percent of workforce
- World leader (by value) of agricultural output for rice, wheat, potatoes, corn, tobacco, peanuts, tea, apples, cotton, pork, mutton, eggs, and seafood (Source: World Factbook)

Chinese food preparation techniques, locally available ingredients, and public holidays and festivals.

**Stay engaged:** Once you establish a relationship with partner restaurants you should be in constant contact to understand sale trends and to make sure the supply of your product is adequate. Post-sale follow-up is important to foster personal and professional business relationships with partners in China. Regular engagement with importers and restaurants will help alleviate any concerns about inconsistent supplies.

**Product education is important:** Be prepared to work with your partner restaurants to make sure the product is being served properly and presented in the most effective manner. Informing both the chef and staff about the product will enable them to sell it more effectively to the end-consumer.

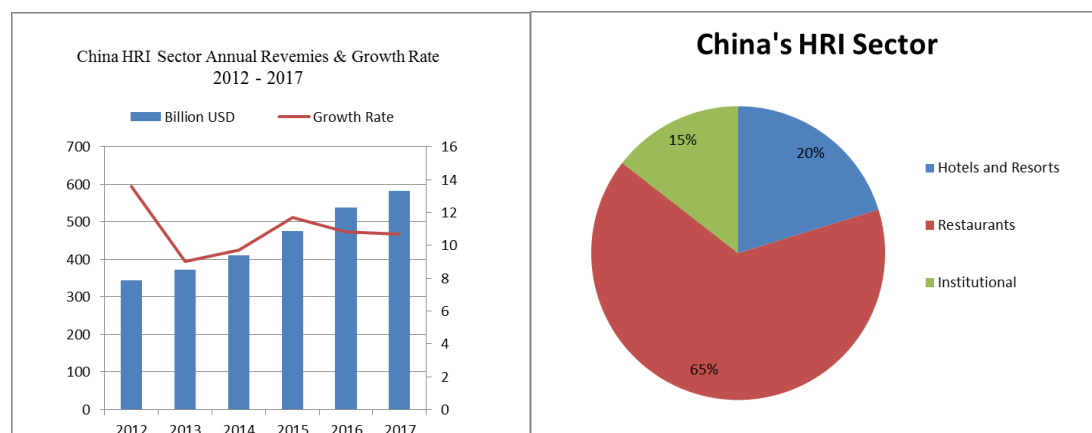
Strengths/Weaknesses/Opportunities/Challenges SWOT Analysis	
<b>Strengths</b> <ul style="list-style-type: none"> <li>- U.S. food products are perceived as high quality, safe, and consistent</li> </ul>	<b>Weaknesses</b> <ul style="list-style-type: none"> <li>- China's food product supply chain continues to be fragmented and underdeveloped</li> <li>- International cuisines are not as widely accepted as local cuisines</li> </ul>
<b>Opportunities</b> <ul style="list-style-type: none"> <li>- Rising disposable incomes</li> <li>- Growing familiarity and demand for imported food products</li> </ul>	<b>Threats</b> <ul style="list-style-type: none"> <li>- Over 12 countries have free trade agreements with China</li> <li>- Domestic food supply is strong and developing</li> </ul>

## Food Service Industry

### Tailor to the market:

Local cuisines dominate the restaurant sector. To improve the applicability of your product, adapt to local cuisines,

China's Hotel, Restaurant, and Institutional (HRI) sector recorded US \$583 billion in sales revenue in 2017, a 10.7 percent increase from the previous year<sup>1</sup>. While 2017 sub-sector figures still not available, in 2016, restaurants accounted for the largest share of the sector with \$352 billion in sales revenue<sup>2</sup>, or approximately 65 percent of the HRI sector. Hotels accounted for \$109 billion and Institutional food service accounted for \$78 billion<sup>3</sup>, approximately 20 and 15 percent, respectively.



China's HRI sector is driven by many economic and cultural factors but the below are especially important to note:

- An ever growing urbanization and the expansion of China's middle class population is fueling the sales increase of the food service industry;
- China's HRI sector is highly fragmented and dominated by small-to-medium enterprises;
- Regional diversity greatly influences the many cuisines and consumer consumption trends of China;
- Restaurants serving China's regional cuisines (e.g., Sichuan Hot Pot, Southern Chinese dumplings, etc.) continue to be more popular than restaurants serving international cuisines (e.g., Steak houses, pizza and hamburger restaurants, etc.), especially in Tier 2 and Tier 3 cities;
- On average, imported food products are considered safer, of higher quality, and more consistent than domestic food products. However, this is rapidly changing as China develops/improves food safety standards and the domestic food industry matures;
- Product food safety and traceability is rapidly becoming popular in China as consumers demand to know more about the food products they eat. Chinese consumers place great value in knowing the production methods, stories and history of the different brands of products they purchase;
- Chinese consumers view dining out as a way to establish and maintain close personal and professional relationships. The overall dining experience is increasingly important for consumers in both the casual dining

<sup>1</sup> 2018 Annual Report on Catering Industry Development of China, General Report (中国餐饮产业发展报告2018). In comparison, the United States foodservice sector supplied approximately USD \$731 billion worth of food in 2014 according to the USDA Economic Research Service (ERS). <https://www.ers.usda.gov/topics/food-markets-prices/food-service-industry/market-segments/>

<sup>2</sup> 2017 China Statistical Yearbook, Chapter 17-1

<sup>3</sup> Institutional is defined as hospital, school, government agencies, railway, airline, state-owned enterprises, etc. The institutional figure was derived from a Ministry of Commerce's Service and Goods Division report on China Catering Industry Development report (中国餐饮行业发展报告)

space as well as fine dining and high-end establishments; and Meal ordering/delivery apps are also becoming highly popular, especially among white collar workers and students. In 2017, \$30 billion worth of meals were ordered through these meal ordering/delivery apps, a 23.1 percent increase from the previous year. According to industry, online food orders in 2017 made up 5 percent of the entire HRI revenue in China, and continued growth is expected in the years to come.

The HRI sector is highly competitive in China’s Tier 1 cities (i.e., Shanghai, Beijing, Shenzhen, Guangzhou) and is rapidly developing in Tier 2 and Tier 3 cities. Restaurants in China that serve international cuisines, which tend to be more expensive and offer an upscale ambiance, are more likely to use imported food products. U.S. exporters should strongly consider training food service chefs and staff on the proper preparation and presentation of the various U.S. food products when supplying any establishment in the HRI sector. While the HRI sector is developing, many food service professionals lack experience in using U.S. ingredients and other imported food products.

Consumer preferences in China have greatly changed over the last decade and consumers now increasingly demand high quality food products that are consistent and safe. In a recent consumer study by the U.S. Department of Agriculture (USDA), consumers responded with favorable perceptions of U.S. food products noting freshness, better flavor and nutritional value as a few of the top variables when deciding to purchase U.S. products. To read the full report, please visit: [GAIN Report on Consumer Preferences](#).

In 2019 and beyond, Chinese consumer demand for safe, high quality imported products will continue to be driven by China’s rising disposable incomes and increasing urbanization. To learn more about other trends and changing consumer preferences in China, please see the [2017 Exporter Guide to China](#).

U.S. Supplier ADVANTAGES	U.S. Supplier CHALLENGES
Products from the United States are perceived to be high quality, safe, and consistent.	China has many Free Trade Agreements (FTAs) in development and existing FTAs with ASEAN, Australia, Singapore, South Korea, Maldives, Pakistan, New Zealand, Chile, Peru, Costa Rica, Iceland, Switzerland, Georgia, Hong Kong, Macao, and Taiwan.
American culture (e.g., holidays, dining experience, etc.) is well known in China and perceived positively.	Chinese cuisine dominates the market. Adapting U.S. food ingredients to Chinese local cuisine and taste profile require a great deal of flexibility from the suppliers’ side.
U.S. exporters and suppliers have access to a network of assistance provided by the USDA’s Foreign Agricultural Service and USDA trade associations (please see section 5 below for key contacts and further information).	There continues to be many market access issues, including restrictions on poultry, select fresh fruit and vegetables, and more.

## SECTION II. ROAD MAP FOR MARKET ENTRY

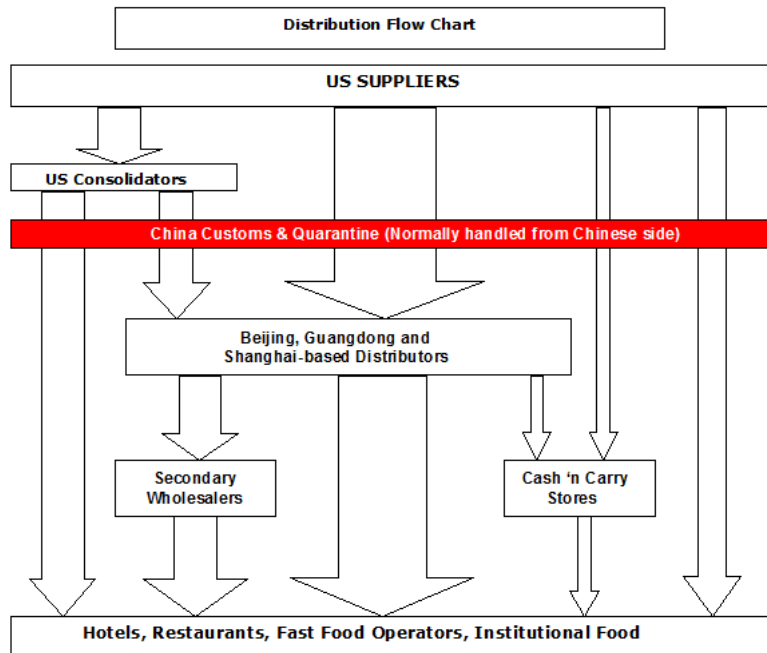
Entering China’s HRI market can be rewarding but it requires a large investment in resources (e.g., time, financing). Selling and distributing your product in China often requires face-to-face contact, a special

effort to educate key stakeholders about the product, and a sound and efficient distribution system. Entry strategy should focus on the elements below:

1. *Selecting a distribution channel:*

There are multiple channels through which U.S. product can enter into the Chinese market. The appropriate channel depends on the type of product, level of desired control, and target consumer. In general, most companies will import through one of the following:

**Exhibit 1: Distribution Channels**



- **Option 1:** Full-service importers/distributors will purchase the products and take full ownership of the sale and distribution in China. The majority of full-service importers will seek to obtain exclusivity agreements with exporters but exporters should be cautious with exclusivity agreements.
- **Option 2:** U.S. consolidators fill orders for China-based distributors and/or fill direct orders for restaurants and hotels in China. U.S. consolidators usually offer efficiency and an understanding of the processes/regulations.
- **Option 3:** Direct sale to an end-user is extremely rare and complicated and usually limited to high volume customers (e.g., fast food chain, hotel chains). Even if an exporter is engaged in direct to end-user sales, it is advisable for the exporter to have local agents to handle the paperwork and licensing as unexpected issues/hassles are common.

A distributor in China should be able to handle customs, quarantine, and any licensing procedures needed for the food product. A number of distributors will complete the necessary paperwork themselves, while others will use an import agent. For some products, multiple documents and certificates may be needed. USDA China strongly advises U.S. exporters to work with the importer, the local import agent, distributor, and/or the end-user to make sure the products are in compliance with Chinese regulations and all proper documentation has been completed. For more on these regulations, please visit: [USDA’s Food and Agricultural Import Regulations \(FAIRS\) Report](#).

## *2. Tailoring to the market:*

Educating Chinese consumers about your food product is important. Education can include everything from showing distributors how to handle the product, to demonstrating how to prepare the food product, to showing how the product should be served. Catalogues, recipes, and handling instructions should be provided in Chinese. HRI promotions (e.g., chef demonstrations, menu promotions, kitchen takeovers) are an effective tool to inform the end-user about the product. General advice for food product exporters for the HRI market is:

- Take time to study the market. It is critical to understand the target consumer and prospective clients before you enter the market. How a product is prepared in the United States is often different than how it is prepared in China.
- Incorporating western food ingredients into local Chinese cuisines will significantly increase sales potential. Be prepared to adapt your product to the demands of the end-user.
- Consider the regional cuisines when presenting your product. Many successful companies will focus on one region and then expand the product into other regions once a deeper understanding is acquired.
- Recognize the opportunity of promoting your products during locally celebrated holidays, festivals, and customs.
- Be prepared to tell the story of your product. Consumers in China value information about what they are consuming. Traceability and organic products are recent trends, especially amongst the younger generations.

## *3. HRI Sub-Sector Profiles:*

### **Hotels and Resorts**

Partially spurred by major international events, conferences and trade shows, many internationally-owned or managed hotel groups are rapidly expanding operations in China. Although most international hotel chains are located in first tier markets such as Shanghai, Beijing, Guangzhou, and Shenzhen, international hotels have also been aggressively expanding in second, third-tier cities and top tourism destinations.

On average, food service operations in hotels and resorts account for approximately 20 percent of the total hotel's revenue. Unlike in many Western countries, restaurants in hotels are not necessarily visited by only lodging guests, rather they are frequently visited by outside guests. Generally speaking, restaurants in the hotels are considered to have superior quality and service. Hotels often purchase ingredients and food products through a centrally managed system. Imported food products are often preferred by international hotels because the hotels cater to a diverse clientele.

For a list of international chain hotels and resorts in China please see appendix 1.

### **Restaurants**

Geographically large and regionally diverse, China has very distinct local and regional food and flavor preferences. While restaurants serving local cuisines continue to dominate the market, western cuisines are becoming popular in Tier 1 cities. Restaurants serving western cuisines account for approximately 5

percent of the total HRI sector revenue<sup>4</sup>. In general, ingredients for non-chained establishments are sourced from local retailers and markets.

Important trends for the restaurant sector:

- As disposable income levels increase, consumers in China are demanding higher quality food products. Per capita disposable income has increased 30 percent since 2013, with a 9.0 percent increase from 2016 to 2017, reaching \$3,820<sup>5</sup>. However, the amount in more developed coastal areas is usually two to three times higher than the national figure
- Restaurants are highlighting product of origin as a selling point. For example, restaurants will label dishes with titles such as “U.S. beef” or “Boston lobster” to market the dish at a premium price point.
- Bakery shops continue to be popular in both first and second-tier cities. Imported dairy, sugar, flour, nuts and dried fruits are widely used in mid to high-end bakery stores because the quality of imported ingredients is perceived to be higher.

General advice for the restaurant sector:

- Tailor to the market: Local cuisines dominate the restaurant sector. To improve the applicability of your product, adapt to local cuisines and Chinese preparation techniques.
- Be consistent and engaged: Importers and restaurants often express concern about inconsistent supplies. Once you establish a relationship with partner restaurants make sure to maintain constant contact to understand how sales are going and to make sure the supply is adequate for your partner while also nurturing the business relationship.
- Teach the chef and restaurant staff: Be prepared to work with your partner restaurants to make sure the product is being served properly and presented in the most effective manner. Informing both the chef and staff about the product will enable them to sell it more effectively to the end-consumer.

#### 4. *Institutional Food Service:*

Traditionally, institutional food service in China was primarily for hospitals, government offices, army, schools, and transportation (i.e., train, flights). However, as China slowly transitions into a services economy, institutional foodservice has expanded into office complexes. The majority of institutional food service providers are small in scale. International institutional catering groups take only a small share in the market.

According to the China Catering Association, the institutional food service sector reached \$78 billion in revenue in 2016, or 15 percent of revenue of the entire HRI industry. However, the institutional food service sector is facing many challenges, such as lack of known brands and unstandardized operational standards, food safety control and management measures, and logistical procedures.

Due to extreme price sensitivity within much of the sector, the catering market has yet to use a meaningful level of imported food and beverage products. However, with increasing wealth, high-end office complexes and private companies, institutional food service could be a future market for imported food ingredients.

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<sup>4</sup> China’s Ministry of Commerce (MOFCOM): <http://fta.mofcom.gov.cn/english/index.shtml>

<sup>5</sup> China Bureau of Statistics – 2018 edition

For more information on the HRI sector for specific regions of China, please see the [2017 HRI GAIN Report](#).

### **SECTION III. COMPETITION**

Food products for the HRI sector from the United States compete both with domestic and imported foods. Since China joined the World Trade Organization in 2001, imported food products have become more accessible and with that, competition has increased. China currently has FTAs in development and existing FTAs with ASEAN, Australia, Singapore, South Korea, Maldives, Pakistan, New Zealand, Chile, Peru, Costa Rica, Iceland, Switzerland, and Georgia<sup>6</sup>.

Most imported products face at least some locally-manufactured, lower-priced competition, with only a few exceptions (e.g., olive oil). Significant competition also comes from large international corporations with local production. In general, locally-produced products are also improving in quality, so chefs and purchasing managers are increasingly faced with balancing quality and cost when choosing imported or domestic supply.

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<sup>6</sup> China's Administration for Quality Supervision Inspection and Quarantine (AQSIQ) <https://www.aqsiq.net/fta>



## Exhibit 2: Competition Chart

Major Products, Market Shares by value, and Competitor Situations			
Product	Foreign Suppliers	Foreign Supplier Situation	Local Supplier Situation
<b>Beef Imports</b> \$3.1 billion	<ol style="list-style-type: none"> <li>1. Brazil: 28%</li> <li>2. Uruguay: 22%</li> <li>3. Australia: 21%</li> <li>4. New Zealand: 13%</li> <li>5. Argentina: 12%</li> <li>7. USA: 1%</li> </ol>	<p>FAS Post forecasts China's beef imports will continuously grow to reach 1.3 million tons in 2019, a 26 percent year on year increase compared to 2018.</p> <p>While U.S. beef began shipping in June 2017, South American countries, led by Brazil, will still be the top suppliers for the China market and occupied a roughly 62 percent market share in 2017. GAIN Report: <a href="#">Livestock and Products Annual</a></p>	<p>FAS Post forecasts China's 2019 beef production will increase slightly, but that demand will continue to outpace production growth, necessitating increasing imports.</p>
<b>Pork Imports</b> \$4.3 billion	<ol style="list-style-type: none"> <li>1. USA: 27%</li> <li>2. Spain: 15%</li> <li>3. Germany: 14%</li> <li>4. Canada: 11%</li> <li>5. Denmark: 9%</li> </ol>	<p>FAS Post forecasts China's pork imports will decrease by 22 percent in 2019 to 1.2 million tons, due to increased domestic supply. Furthermore, Chinese consumers' pork consumption is already at a very high level and will only grow slightly. GAIN Report: <a href="#">Livestock and Products Annual</a></p>	<p>Multiple outbreaks of African Swine Fever have occurred in China for the first time and could significantly impact China's swine population and the availability of domestically produced pork. Assuming China controls the current outbreak, FAS Post forecasts pork production to continue to increase.</p>
<b>Poultry Imports</b> \$1.0 billion	<ol style="list-style-type: none"> <li>1. Brazil: 85%</li> <li>2. Argentina: 11%</li> <li>3. Chile: 4%</li> <li>4. Poland: 0.4%</li> <li>7. USA: 0.005%</li> </ol>	<p>FAS Post forecasts chicken meat imports will decrease 7 percent in 2019 to 255,000 metric tons as a result of trade frictions between China and its largest poultry supplier, Brazil. GAIN Report: <a href="#">Poultry and Products Annual</a></p>	<p>FAS Post forecasts China's production of chicken meat will continue to recover in 2019, growing 3 percent to 12 million metric tons due to cumulative increases in white-feather, yellow-feather, and hybrid broiler production.</p>
<b>Fish and Seafood Imports</b> \$7.8 billion	<ol style="list-style-type: none"> <li>1. Russia: 17%</li> <li>2. USA: 13%</li> <li>3. Canada: 10%</li> <li>4. Norway: 6%</li> <li>5. New Zealand: 5%</li> </ol>	<p>Imported seafood is believed to be higher quality, cleaner, and containing higher nutrition (consumer insight). Seafood is also regarded as a premium food item in most restaurants throughout China. New Zealand, Norway, Canada, Russia and the United States are China's major seafood suppliers.</p> <p>The most popular U.S. export seafood are Maine lobsters, salmon, codfish, king crabs, and processed sea cucumber.</p>	<p>Traditional Chinese restaurants prefer live seafood and fish. While the supply chain is developing to allow for live lobster and crab from the United States, most imported fish and seafood products are frozen/chilled.</p> <p>China is a major supplier of many fish and seafood products, including squid, shrimp, cod, siluriformes, cuttle fish, eel, crab, and more.</p>
<b>Dairy Products Imports</b> \$9.4 billion	<ol style="list-style-type: none"> <li>1. New Zealand: 38%</li> <li>2. Netherlands: 14%</li> <li>3. France: 9%</li> </ol>	<p>New Zealand and Australia have aggressive suppliers, low costs, and advantages in shipping time. Chinese regulatory hurdles limit eligible U.S. supply. GAIN Report: <a href="#">Dairy and Products Semi-annual</a></p>	<p>China's dairy industry is growing but still in an early stage of development. It produces milk and yogurt but doesn't really compete in cheeses or butters.</p>

	4. Germany: 9% 6. USA: 7%		
<b>Wine &amp; Beer</b> Imports \$3.6 billion	1. France: 32% 2. Australia: 20% 3. Chile: 9% 4. Spain: 7% 8. USA: 3%	Wine from the European Union enjoys a higher awareness among Chinese consumers. Wines from Chile enjoy a zero percent tariff and Australia wine enjoys a 2.8 percent tariff as of January 1, 2018, due to the Free Trade Agreement.	China's wine industry is evolving; however it may take decades to catch up with international market leaders. The craft beer industry is nascent with many local breweries starting new operations, some using U.S. hops and other ingredients.
<b>Fresh Fruit</b> Imports \$5.1 billion	1. Chile: 20% 2. Thailand: 20% 3. Vietnam: 13% 4. Philippines: 10% 5. USA: 8%	Chile is a counter-seasonal supplier of similar U.S. products. Most southeast Asian fruit differs from U.S. products. The imported fruit market has become more competitive as more fruits from different countries are gaining market access.	Local products cannot compare with the quality, variety and taste of U.S. fruit. However, the quality of local fruits is improving. Some of the local substitutes such as apples and citrus are very competitive in pricing.

#### SECTION IV. BEST PRODUCT PROSPECTS CATEGORIES

Interviews with HRI food service professionals repeatedly confirm that U.S. food exporters should select top quality products for export to China. U.S. foods benefit from expectations of high and consistent quality, attractive appearance, convenient packaging and food safety. USDA China has consistently found that it is difficult for most U.S. food products to compete with Chinese domestic products on price in the HRI market. Instead, suppliers should target niche as well as regional markets. As of the date of publication, many of these products are facing additional tariffs from the Chinese Government. For more information on these, please visit the [FAS GAIN system](#) for reporting from the Office of Agricultural Affairs in Beijing.

#### Exhibit 3: Best Prospective Products

<b>Products in Market with Continued Good Potential</b>	<b>Products in Market with Unrealized Potential</b>	<b>Products with Market Access Barriers but with Good Potential</b>
<ul style="list-style-type: none"> <li>• Beef</li> <li>• Pork</li> <li>• Fishery products (Salmon, Geoduck, lobster, Dungeness crab, cod fish)</li> <li>• Tree Nuts (almonds, pistachios, pecans)</li> <li>• Dried fruit (cranberry, blueberry)</li> <li>• Fresh fruit (cherry, apple, citrus)</li> </ul>	<ul style="list-style-type: none"> <li>• Dairy products</li> <li>• Wheat flour and pasta</li> <li>• Dehydrated potatoes</li> <li>• Chocolate</li> <li>• Sugar confectionary</li> <li>• Mixes and doughs</li> <li>• Breads, pastries, and cakes</li> <li>• Cookies, waffles, and wafers</li> <li>• Breakfast cereals</li> <li>• Alcoholic beverages</li> <li>• Sauces and condiments</li> </ul>	<ul style="list-style-type: none"> <li>• Rice</li> <li>• Fresh fruits and vegetables (Berries, avocados)</li> <li>• Poultry products</li> <li>• Organic foods</li> </ul>

## SECTION V. KEY CONTACTS AND FURTHER INFORMATION

USDA's Foreign Agricultural Service (FAS) has an unrivaled global network, of more than 90 Offices of Agricultural Affairs (OAA) and Agricultural Trade Offices (ATO) that connects exporters to foreign customers and provides crucial information on international agricultural markets. FAS operates six offices in China. These include one OAA located in Beijing and five ATOs located in Beijing, Chengdu, Guangzhou, Shanghai, and Shenyang. Beijing OAA is responsible for trade policy and commodity analysis, and assists with market access and sanitary and phytosanitary issues for all of China. Agricultural Trade Offices were created with the sole purpose of focusing on agricultural marketing efforts. All five ATOs in China provide support, assistance, and oversight to USDA cooperators, work directly with U.S. companies to help them gain the knowledge and contacts needed to begin exporting to China, and prepare and disseminate reports about China's agricultural market. The offices coordinate U.S. participation in various trade shows, sponsor marketing activities to introduce companies handling U.S. products to key retailers, food service and food processing companies throughout China, and provide guidance in the resolution of customs clearance issues.

### *1. Trade Shows in China*

USDA has four endorsed trade shows in China for exporters to participate in. Many suppliers get excellent market information by scheduling their visit to coincide with one of the trade shows. The ATOs in Beijing, Chengdu, Guangzhou, Shanghai, and Shenyang can all provide contact details for show organizers upon request as well as recruiting distributors or traders to the show for matchmaking meetings. For more information on trade shows featuring food and agricultural products in China's HRI sector, visit [here](#). For additional information on USDA endorsed trade shows, please visit: [USDA Endorsed Trade Shows](#).

### *2. Stay in touch with USDA China*

To subscribe and to see an archive of our monthly *China eNewsletter*, please visit our USDA China website [here](#). For contact information for USDA China OAA and ATOs see appendix 2.

### *3. Chinese Resources on Import Regulations*

China has strict documentation requirements for the majority of imported food and agricultural products regarding quality, quarantine, origin, and import control. Products may also need to meet other criteria such as packaging requirements, pre-clearance (if applicable), treatment options, labeling requirements, and container conditions. In most cases, Chinese importers can provide enough information for U.S. exporters to assess trade feasibility. It is also important and helpful for U.S. exporters to know some general information about the most involved government bodies, such as China's Ministry of Agriculture and the General Administration of Quality Supervision, Inspection and Quarantine of the People's Republic of China. For specific Chinese Ministry websites and additional contacts, please review the [most recent China Exporter Guide](#).

## APPENDIX

### 1. Hotels and Resorts – HRI Supplemental Report

China's hotel and resort sector continues to expand, increasing by nearly 8 percent over the past 5 years. The World Tourism Organization (WTO) estimates by 2020 China will become the world's most popular tourist destination.

<b>Major International Star Rated Hotel Chains in China (2017)</b>			
<b>Brand Name</b>	<b>Subsidiary Brands in China</b>	<b>Headquarters / China Headquarters</b>	<b>Number of Hotels in China</b>
Intercontinental Hotel Group	<ul style="list-style-type: none"> <li>• Intercontinental Hotels &amp; Resorts</li> <li>• Crown Plaza</li> <li>• Holiday Inn</li> <li>• Holiday Inn Express</li> <li>• Hotel Indigo</li> <li>• HUALUXE</li> </ul>	UK / Shanghai	292
Accor Hotels & Resorts	<ul style="list-style-type: none"> <li>• Sofitel</li> <li>• Fairmont</li> <li>• Swisshotel</li> <li>• Pullman</li> <li>• Grand Mercure</li> <li>• Mgallery</li> <li>• Ibis</li> <li>• Banyan Tree</li> <li>• Huazhu hotels</li> </ul>	France / Shanghai	650
Cendant Corp.	<ul style="list-style-type: none"> <li>• Howard Johnson</li> <li>• Wyndham</li> <li>• Ramada</li> <li>• DaysInn</li> <li>• Super 8 Motel</li> </ul>	USA / Beijing	110
Marriot Hotel Group (*merged with Starwood Hotels & Resorts Worldwide in 2016)	<ul style="list-style-type: none"> <li>• Renaissance</li> <li>• Marriott Hotels &amp; Resorts</li> <li>• Courtyard Marriott</li> <li>• The Ritz-Carlton</li> <li>• JW Marriott</li> <li>• Sheraton Hotels &amp; Resorts</li> <li>• Westin</li> <li>• Le Meridien</li> <li>• Four Points</li> <li>• A Loft</li> <li>• W Hotels</li> <li>• St Regis</li> <li>• The Luxury Collection</li> <li>• Element</li> </ul>	USA / Hong Kong	424 (121+303)
Shangri-la Hotel	<ul style="list-style-type: none"> <li>• Shangri-la Hotel</li> <li>• Traders Hotel</li> </ul>	Singapore / Shanghai	55

Kempinski Hoteliers	<ul style="list-style-type: none"> <li>• Kempinski</li> </ul>	Germany / Beijing	22
Hyatt Hotels Corp.	<ul style="list-style-type: none"> <li>• Hyatt Regency hotels</li> <li>• Grand Hyatt</li> <li>• Park Hyatt</li> <li>• Hyatt Hotels &amp; Resorts</li> <li>• Andaz</li> <li>• Hyatt Place</li> <li>• Hyatt House</li> </ul>	USA / Beijing	57
Carlson Rezidor Hotels	<ul style="list-style-type: none"> <li>• Radisson</li> <li>• Regent</li> <li>• ParkPlaza</li> <li>• ParkInn</li> <li>• Radisson Blu</li> </ul>	USA / Singapore	40
Hilton Hotels Corp.	<ul style="list-style-type: none"> <li>• Hilton</li> <li>• Double Tree</li> <li>• Conrad</li> <li>• Hilton Garden Inn</li> <li>• Waldorf Astoria</li> </ul>	USA / Shanghai	110
Four Seasons	<ul style="list-style-type: none"> <li>• Four Seasons Hotels</li> </ul>	Canada / Shanghai	9

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