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*Sector horticulture
NBSO Jinan*

*>> Duurzaam, Agrarisch, Innovatief
en Internationaal ondernemen*



Colofon

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Preface

In May 2014, at the Dutch Pavilion of the Qingdao International Horticulture Expo in Shandong province, a launch ceremony was held to announce the access of Dutch conference pears to the Chinese market. This was one of the successful stories regarding agro-food cooperation between the Netherlands and China. Looking back about 20 years ago, Dutch agriculture was among the pioneers that first explored the Chinese market, and Shandong was automatically chosen as one of the first partners of Dutch seed trade.

Shandong province is consistently a main and leading power in terms of agriculture in China. The vegetable production in Shandong should be highlighted for its large sown areas, total output, export output, relatively high level in agricultural technology and technics. NBSO Jinan did an initial study on the agro-business in Shandong, aiming to sketch out the current situation of Shandong agriculture, mostly focusses on vegetable production, which may be of help in discovering potential business opportunities in Shandong.

The report was done mainly by desk research with official statistics, news releases, sector reports from agricultural authorities and knowledge institutes, and interviews with insiders who are experienced in Shandong agriculture.

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2 Facts and Figures about Shandong

Location	on the east coast of China, facing the Korean Peninsula and the Japanese archipelago across the sea
Geography	Surface area 157,126 km ² (420km from north to south, 700km from east to west)
Coast line	3,345 km, 1/6 of nation's total
Population	97.3 million (2013)
Climate	Average temperature 11-14°C Average precipitation 600-700mm
GDP 2013	5468.43 billion RMB (3 rd nationwide after Guangdong and Jiangsu)
Foreign Trade of Agro-products	Export of agro-products 15.2 billion USD; Import of agro-products 25.78 billion USD
Export partners	Japan, Korea, EU, U.S., ASEAN
Dutch investment in Shandong	63
Shandong investment in the Netherlands	25

3 General Information about Shandong Agriculture

Shandong Province is an important base for agricultural production, processing and export in China. It is the leading province in China in terms of total value, added value, total import and export of agro-products for consecutive years. (See Chart-1)

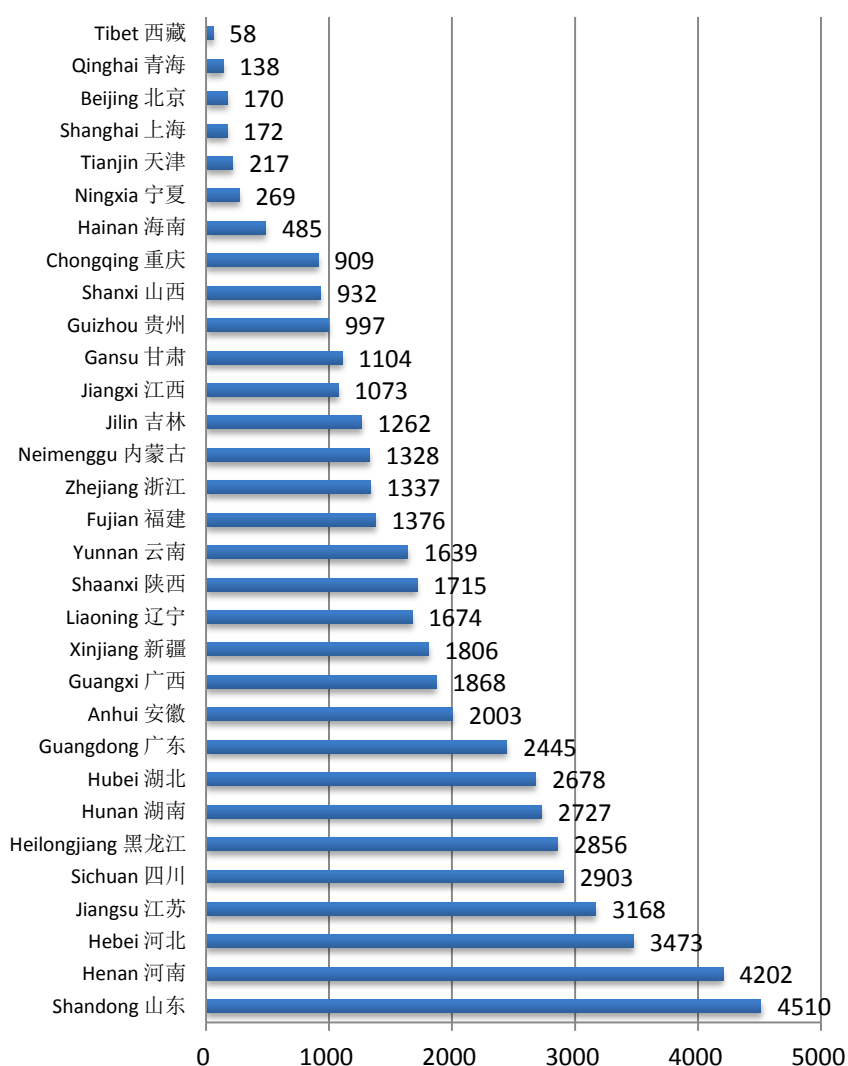


Chart -1: Gross Agricultural Production in China, per region 2013
(×10⁸ RMB)

(Source: China Statistic Yearbook 2014)

Shandong's agriculture shows comprehensive strengths in the main rating indexes which are often used to evaluate the agricultural performance of a region. The total sown area, sown area of grain crops, cotton, vegetables and orchards are among the top provinces in China (See Table-1).

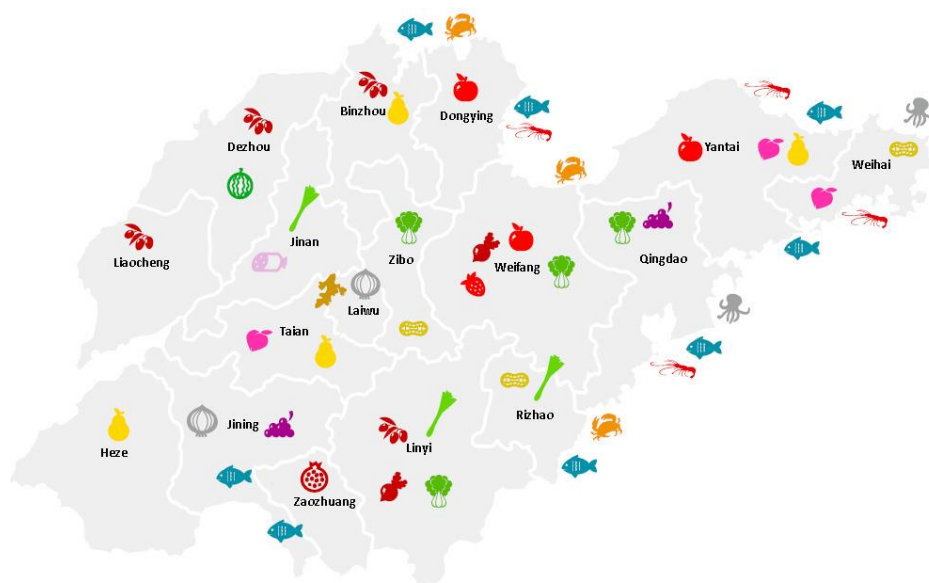
Table-1: Sown Area of Crops in Shandong Province 2013

	1000 Hectares	Rank in China
Total Sown Area	10976.4	3
Sown Area of Grain Crops	7294.6	3
Sown Area of Vegetables	1832.9	1
Sown Area of Oil-bearing Crops	794.9	6
Sown Area of Peanut	780.3	2
Sown Area of Cotton	672.8	2
Sown Area of Orchard	633.9	6

(Source: China Statistic Yearbook 2014)

Shandong is well-known for a number of varieties that have very good quality and are planted in large quantities, such as Chinese cabbage, radish, green onion, garlic, ginger, apple, pear, juicy peach, winter date, grape and the edible fungus and so on. (See Chart-2) Some areas are nationwide famous for certain agro-products, for example Laiwu for ginger, Zaozhuang for potatoes, Linyi for garlic, Jinan for Chinese onions, Yantai for apples and pears and Binzhou for winter dates. By 2013, 128 geographical indication products had been authorized by the Trademark Office under the State Administration for Industry and Commerce.

In 2013, the total import and export of agro-products of Shandong reached 41 billion USD. It exported 15.2 billion USD (up 1.2% y-o-y), accounting for 22.7% of the national total, and has been the top exporter for 16 consecutive years. Shandong's agricultural exports were mainly composed of aquatic products, vegetables, fruit and fruit products, animal products, peanuts and peanut products, which altogether contributed 77.3% of the total value of agro-export.

**Chart-2: Main Agro-production Map of Shandong**

(Source: Shandong Commerce Department)

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Vegetable Production

Vegetable production plays an important part in the agricultural production and foreign trade of Shandong. The total sown area of vegetables exceeded 1.83 million hectares with a total output of 96.58 million tons, among of which over 850,000 hectares is protected area by 2013 (See Table-2).

Table-2: Sown Area of Vegetables of Shandong, per variety 2013

Nr.	Vegetable Variety	Sown Area ($\times 10^3$ Ha)	Y-O-Y Growth	Output ($\times 10^3$ Ton)	Y-O-Y Growth
1	Garlic & Onion	348.0	0.2	13,039.6	0.9
2	Chinese Garbage	255.3	4.9	15,104.5	4.7
3	Cucumber	112.1	-0.9	7,232.1	1.7
4	Potato	110.2	-1.1	4,650.7	3.5
5	Tomato	77.9	0.5	5,010	-1.5
6	Celery	67.5	13.6	4,064.5	20.3
7	Eggplant	62.8	2.8	3,719.4	4
8	Spinach	59.9	1.3	2,619.7	4.2
9	Pepper	56.4	6.7	2,811	9.4
10	Ginger	53.7	-1.6	2,950.5	-0.6
Sub-total		1203.9	--	61,202	--
Vegetable Total in Shandong		1832.9	1.5	96,582	2.9

(Source: Shandong Agriculture Department)

The protected areas accounted for 47% of total sown area of vegetables yet contributed over 75% of total vegetable output in value (See Chart-3).

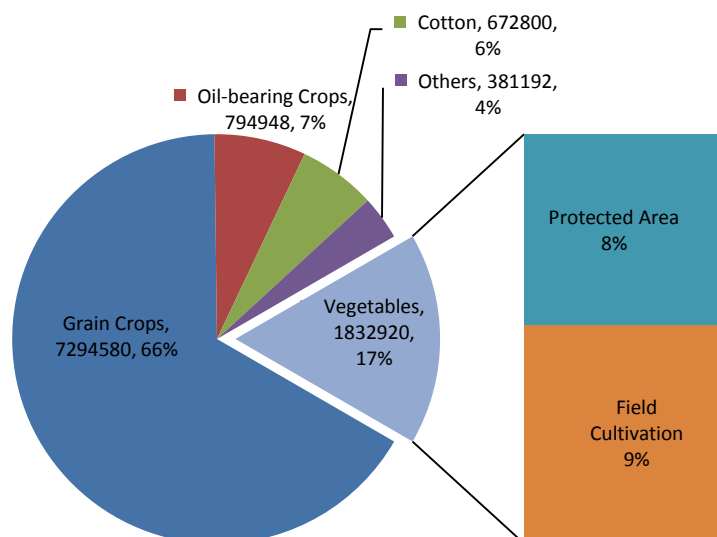
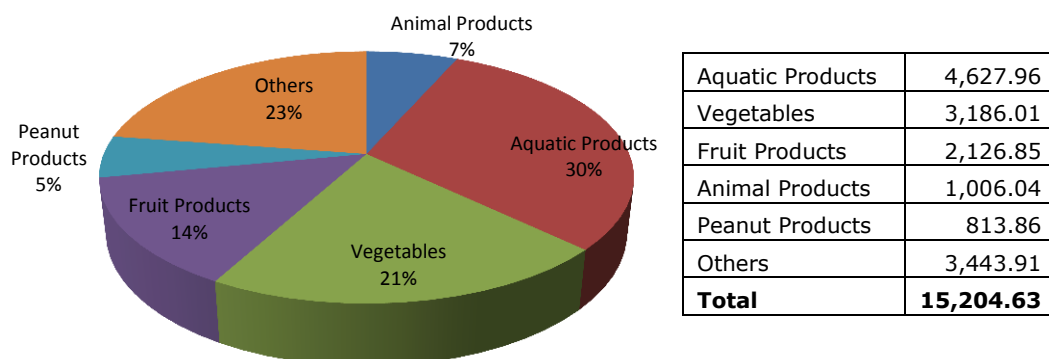


Chart-3: Sown Area of Shandong Province 2013 (Hectare)

(Source: Shandong Agriculture Department)

In 2013, Shandong exported 3.4 million tons vegetables and vegetable products with a total value of 3.2 billion USD to over 180 countries and regions in the world, accounting for 21% of the province's total agricultural export (See Chart-4). Japan, Korea, EU, and U.S. were the traditional destinations of Shandong agro-export, making up over 60% of the total export value. Export to ASEAN, Russia, Brazil and other emerging markets also witnessed a rapid growth in recent years.



**Chart-4: Export of Agro-products of Shandong 2013
(million USD)**

(Source: Shandong Agriculture Department)

Primary products have been playing a dominant role in the export. Currently over 80% of the export is made up by primary export. Moreover, some kinds of local specialties are exported in very large quantities. For example, garlic export normally contributes about 40% of the total vegetable export, and apple export contributes about 50% of fruit export.

5 Leading Agro-enterprises

Benefiting from the strength in agricultural production and continuous support both at policy level and financial level, the agricultural industrialization developed rapidly in the past decades. Both the quantity of leading agro-enterprise and the processing capacity rank first in China. With the new land circulation policy, farm lands can be collected into companies, cooperatives, and individuals that would operate large scale agricultural productions. Those agro-enterprises became the main force to take over the lands from individual farmers and upgrade the production to a more standardized and efficient way. By 2013, there are more than 9,000 leading agro-enterprises in Shandong, including 89 state-level leading agro-enterprises and 743 provincial-level enterprises (See Table-3).

Table-3: Numbers of Leading Agro-enterprises in Shandong

Yearly Turnover	Number of Enterprises
>10 billion RMB	12
5 -10 billion RMB	27
>100 million RMB	2512

(Source: Shandong Agriculture Department)

Some Leading Companies

1. Shouguang Vegetable Industry Holding Group

www.sgscykg.com

Shouguang Vegetable Industry Holding Group is located in Shouguang which is known for vegetable production. The group was established in 2009 and it has 5 subsidiaries with total assets of over 5 billion RMB. The group focusses on the full chain of vegetable business, including research, breeding and promotion of seeds, standardized vegetable production, deep-processing, logistics, wholesale, e-commerce, and greenhouse project.

The company has a long time cooperation with Dutch agricultural experts. It has established a production facility in the Netherlands and cooperates with Dutch companies and uses their knowledge and experience to optimize vegetable production.

2. Xisen Potato Industry Group

www.xisen.com.cn

The company was established in 2005. Now it's a high-tech company that is dedicated to the potato business, from R&D for new varieties, breeding, production, to import and export business. The company has set up production bases in Shandong, Beijing and Inner Mongolia. The base in Inner Mongolia is about 80,000 hectares, able to supply 1.3 million tons of potatoes per year.

The company has a high level research infrastructure, 'State-level Engineering and Technological Center for Potato', representing the top level in China. Over 90 researchers work for this centre.

3. Taian Taishan Asia Food Co., Ltd

www.taishanasiafood.com

Taishan Asia Food was founded in 1992 and has been engaged in organic vegetable growing and processing since 1994. Today it has been the earliest, largest and leading professional manufacturing enterprise that is specialized in growing, processing and exporting of organic vegetables. Taishan Asia Food is also the first company to obtain Chinese and International organic certification in China.

Now Taishan Asia Food has developed 1333.2 hectares of organic vegetable farms and the annual capacity of organic IQF vegetables reached 20,000 tons. The main products are frozen beans, leafy vegetables, root vegetables, broccoli/cauliflower, edible mushrooms, mixed-vegetables, dehydrated garlic/onion, fresh garlic bulbs and peeled garlic.

4. Goodfarmer Agricultural International Trade Co., Ltd

www.goodfarmer.com

The company was founded in Shandong in 2002. Goodfarmer has three major business fields, which are export, import and domestic distribution of vegetables and fruits. The export business of Goodfarmer includes manufacturing, processing, transportation, sales and marketing of agricultural products, such as garlic, apple, ginger, pear, and pomelo. The products have been exported to more than 100 countries and regions all over the world, such as Europe, South America, Africa, Oceania, Middle East, South Asia and Southeast Asia.

5. Shouguang Tianyuan Fruit & Vegetable Co., Ltd

www.sgliaoyuan.cn

The company was established in 2002 in Shouguang, and is active in R&D, production, processing and marketing of organic agro-products. Today, it has its own 66.7 hectares production base and cooperates with local farmers and cooperatives to plant organic products. The brand name of their vegetables 'Liao Yuan' was recognized as 'Green Food Brand'. It is the supplier of fresh vegetables and fruits for large chain supermarkets, e.g. Wal-Mart, Carrefour, and Tesco.

6 Quality Safety Demonstration Areas for Agricultural Export

Shandong was the first province to establish 'Quality Safety Demonstration Areas for Agricultural Export'. It set up a working mechanism combining government, institutions, enterprises and the market soon after the release of the 'Opinions on Accelerating the Building of Quality Safety Demonstration Areas for Agricultural Export' from the central government in 2007. The aim of the demonstration area is to upgrade the agricultural production to a sustainable way that can be generally described as follows:

- No hidden hazards
- No violation of chemical use
- No blind spots in management
- No obstacles to exports

To achieve this goal the following 5 measures have been substantially taken in daily production.

- Further improve and promote standardization system
- Stringently control and regulate the use of agricultural chemicals
- Establish a traceability system for agricultural exports
- Improve credibility of enterprises in quality assurance
- Boost international economic and trade cooperation in agricultural products

So far, there are 8 demonstration cities (Weihai, Rizhao, Laiwu, Qingdao, Yantai, Weifang, Zibo, Linyi) and 78 demonstration counties established in Shandong, and the pass rate for food and agro-products maintains over 99% in recent year. In 2014, with support of the Ministry of Commerce and AQSIQ, Shandong announced to be the first 'Demonstration Province for Quality Safety for Agricultural Export' in China.

7 Supply Chain of Vegetables

7.1 Current Supply Chain

Main parties that may be involved in the supply chain for vegetables include farmers, cooperatives, brokers, field markets, wholesale markets at origin and destination, secondary wholesale markets, distributors, third party logistic providers, supermarkets/retail markets/community markets, as well as importers, exporters and online sellers when foreign trade and e-commerce are concerned. Today, wholesale markets play a dominant role in the supply chain of vegetables. It's estimated that over 70% of fresh agro-products are distributed through wholesale markets. A typical flow of fresh vegetables from the field to the consumer can be described as in the following chart (See Chart-5). In this model, normally 3 to 4 transactions are supposed to take place in different markets, which causes additional cost in the flow and finally increases the terminal price for consumers.

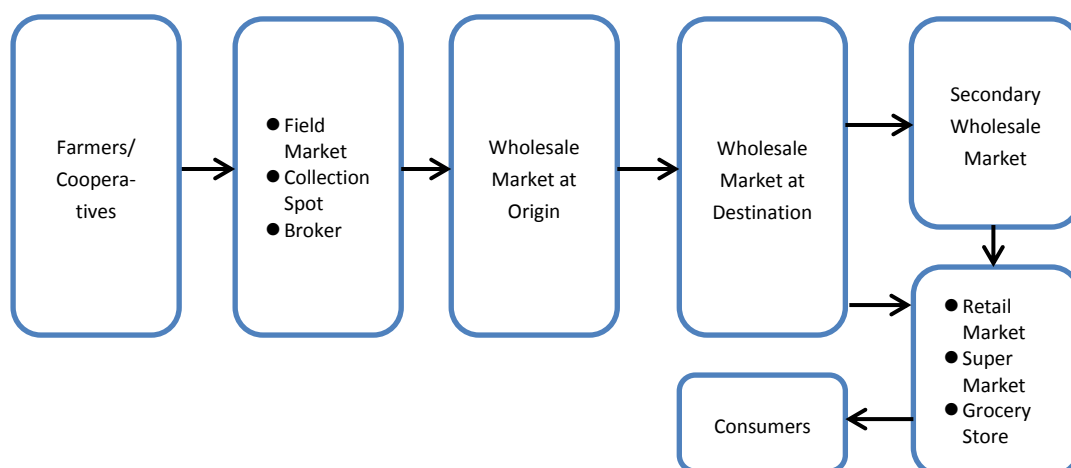


Chart-5: A Typical Supply Chain Model for Vegetables

By 2013, 64 wholesale markets in Shandong have been recognized by the Ministry of Agriculture as 'Key Wholesale Markets', the most of any province in China (See Table-4).

Table-4: Information on Key Wholesale Market in Shandong Appointed by the Ministry of Agriculture

Number of KWM	64
Operation Area	11.56 million m ²
Trading Volume	114.09 million ton
Trading Value	153.79 billion RMB
Number of KWM Classified by Trading Category	
Vegetable	39
Fruit	9
Livestock	2
Aquatic	9
Comprehensive	5
Number of KWM Classified by Trading Value	
Over 10 billion RMB	3
5-10 billion RMB	4
1-5 billion RMB	37
250 million – 1 billion RMB	20

Source: Shandong Agriculture Department

7.2 Direct Sale

With considerable progress in information technology and circulation facilities, e-commerce and direct sale provide new alternatives to current supply chains. Parties on the traditional supply chain began to explore for a new way to simplify the current system, reduce circulation cost, improve operation efficiency, and increase the added value of agro-products. Direct sale from field to supermarket just makes a successful example. For example, Shandong Jinfuyuan Group has 15 chain supermarkets in Shouguang city. Jinfuyuan Logistics, a subsidiary of the group built a workshop for vegetable pre-processing near the distribution centre of agro-products in Shouguang. The logistic company acquires fresh vegetables from the distribution centre and from local farmer cooperatives directly, and run quick quality test and pre-process vegetables with washing, sorting and packaging in the workshop. The processed fresh vegetables will then be distributed to all 15 supermarkets. Also, the logistic company provides processed vegetables to other supermarkets.

By 2013, more than 70 chain business enterprises and 2,400 farmer cooperatives have been connected for direct sale of vegetables and fruits. About 40% of fresh vegetables and fruits sold at large scale supermarkets were delivered directly from farm bases, which lowered the terminal price by 10% and improved the quality and safety assurance by shorter storage and transportation time.

7.3 E-commerce

E-commerce has been developing tremendously and brought great changes and opportunities to the traditional business environment in the past decade. Not only agriculture companies, but also farmer cooperatives and individuals can do business through e-commerce.

In a report conducted by AliResearch (a research institute of Alibaba Group, a world leading e-commerce platform), by the end of 2014, there are 212 'Taobao Villages' in China, while the statistics of 2013 only indicated 20. (See Table-5) 'Taobao Village' refers to those villages where e-stores are concentrated, and meet the following 3 requirements.

1. E-stores should be based in rural areas.
2. The total turnover of e-commerce within a village should be over 10 million RMB per year.
3. At least 100 active e-stores are located in the village, or the number of active e-stores should be more than 10% of total family households in a village.

Table-5 Overview about 'Taobao Villages' in China

Rank	Province	Number of 'Taobao Village'
1	Zhejiang	62
2	Guangdong	54
3	Fujian	28
4	Hebei	25
5	Jiangsu	25
6	Shandong	13
7	Sichuan	2
8	Henan	1
9	Tianjin	1
10	Hubei	1
Total		212

This gives a clear signal that e-commerce is spreading at an unexpected speed in China's rural areas, where ordinary farmers have been involved in the e-commerce business. Today, there are a number of third-party e-commerce platform available for farmers to use for free to distribute products, including fresh agro-products. The most well-known websites are Taobao.com, JD.com, YHD.com, and Dangdang.com. According to statistics from Taobao.com, Shandong is now the top vegetable exporting province, and one of the top aquatic product exporters in China. Thanks to the fast growing logistics network and service providers, fresh agro-products can be delivered to the end consumers as well as those products with longer shelf life. Lots of companies, farmer cooperatives and individuals in Shandong have established their own e-stores on third-party platforms to sell local products, including fresh vegetables and fruits. Compared to traditional distribution channels e-stores are much more focusing on high-end consumers, who have specific concerns about food quality, safety and yet are not sensitive on prices. For example, the snapshot below is from an e-store on Taobao.com which sells Yantai apples, which are very famous for the high quality and good taste. The e-store is operated by a fruit cooperative in Yantai. From the webpage we can find out that just for one apple variety, the monthly sales is over 700 orders.



Another e-store on Tmall.com (sister website of Taobao.com) is a joint project of a Shandong based company and Tmall.com. Shandong Provincial Supply and Marketing Cooperative used to be a state-owned institution in charge of distributing and marketing agricultural supplies and products. It has rich resources and a large network in Shandong. The company established an e-store on Tmall.com to sell agro-products in Shandong. Furthermore, a new brand and corporate identity are specially designed for the store, and simultaneously, physical stores have been established in Shandong's main cities. The new brand name is 'Lu Gong', which means 'originated in Shandong' in Chinese.



In order to be independent from third party platforms, a number of companies build their own e-commerce website. Lewoo is such a platform invested by IT companies. They developed their own website www.lewoo.com.cn to sell agro-products including fresh products. Lewoo itself is not a grower, but uses their expertise in IT and ability to combine parties in the agricultural chain, e.g. growers/producers, logistic companies, and end consumers.



In general, the third-party e-commerce platforms greatly broaden the sales channel of agro-products in Shandong. Besides, e-commerce is also used for distributing supplies for agricultural production, such as seeds and fertilizers. It's a common idea that e-commerce is becoming the new driving force of China's agriculture; hence local governments began to take measures to support those who want to activate e-business of their own. According to the Shandong Department of Commerce, most cities in Shandong have been constructing e-commerce zones to specifically promote e-business, and some zones in Jinan, Qingdao, Weifang, and Jining have been put into operation already.

From a policy perspective, Shandong local governments released favourable policies to companies who are devoted to e-business. For example, Jinxiang e-commerce zone in Jining city (well-known for production of pepper and garlic) a number of favourable policies were implemented for newly established companies in the zone. The office rent is free for the first year, and in the following two years, 50% and 20% rent deduction can be achieved. The zone also provides free training programmes, free consulting and guidance service, free use of public facilities such as meeting rooms, library, and interest-free loans. This kind of supportive policies are quite popular throughout Shandong at the moment, and encourages new graduates and unemployed youth to do e-business as their first career, which has much less barriers for a business starter.

E-commerce is making revolutionary changes to the current distribution channel for agro-products and more and more farmers will benefit from it. At this stage, e-commerce only focuses on high-end consumers, who like to pay extra for the food quality and delivery. However, there is much space to develop a complete and robust supply chain for e-commerce in agriculture. For example, fresh fruit and vegetables have specific requirement for packaging, and sometimes cold chains are needed to keep fruit and vegetables fresh. Furthermore, a credit system should be established for the online sellers of agro-products through which e-commerce companies can be evaluated.

8 Vegetable Seeds

Shandong is an important grower and exporter of vegetables, which means a huge market for vegetable seeds. Foreign seeds companies have been active in the seed market in Shandong for many years. It's estimated that roughly 30% of vegetable seeds used in protected cultivation comes from foreign brands. Imported seeds have advantages in varieties like tomato, sweet pepper, cucumber, onion, and zucchini; while Shandong has its strength in local specialties, like corn, Chinese cabbage, cotton, and oil-bearing crops. In terms of vegetables for export, over 80% of Chinese onions and 70% of onions are planted from imported seeds. In the area of Shouguang, the largest vegetable production base of China, most of the world's famous seed companies have presence by building demonstration and nursery facilities. Over 50% of seeds (in value) planted in Shouguang are from foreign brands, worth about 600 million RMB per year.

Foreign seed companies

Rijk Zwaan, Bejo, Enza, Seminis, Monsanto, Syngenta, Hazera, Nunhems

Local seed companies

- 1. Shandong Seed Corp**
Distribution and import & export of seeds used in agriculture, horticulture, grass, herbs, etc.
- 2. Shandong Shouguang Vegetable Seed Group**
Distribution, import & export, R&D of vegetable seeds
- 3. Shandong Denghai Seed Stock Co., Ltd.**
Distribution, R&D of grain seeds
- 4. Shandong Shofine Seed Company**
Distribution, R&D of Seed of peanut, soybean, corn and wheat

9 Trends and Opportunities

9.1 Trends

As the leading province in China's agriculture, Shandong has been the pioneer marching to modern and sustainable agriculture for years, which can be concluded into following major trends.

1. Agricultural production will be organized on a larger scale. The farm land circulation policy makes it possible to assemble small land pieces from farmers into larger areas for agricultural production. This will be helpful to gain scale effect and improve efficiency, productivity and quality of agro-production.
2. Standardization of agriculture was one of main tasks for agricultural authorities and knowledge institutes in Shandong. It significantly safeguards for the food productivity, quality and safety.
3. New technologies and machineries will be used for agriculture. Shandong already did well in this point. It has the largest protected area in China, and it is still growing by 80,000 hectares every year. Besides, some examples like bio-prevention, information technology, sustainable technologies, and processing technologies have been used and will be spread out within the whole province.
4. Farmer cooperatives will play a more important role. The development of farmer cooperatives of Shandong also takes the lead in China with a 127,000 registered farmer cooperatives by 2014 according to official statistics. However, the number seems too much. In fact, only few cooperatives function well as planned and most of the rest do not have a positive impact at this stage.
5. Distribution network is to be restructured and optimized to simplify the delivery from farmers to consumers, which will result to faster delivery, lower circulation cost and better insurance for food quality and safety.
6. Farmers and companies are looking for more added value from agro-business. Different from conventional trade of primary products, companies are more and more proactive in R&D and processing to increase the value of agro-products.

9.2 Opportunities

Shandong agriculture always tries to learn from world-leading agricultural countries and catch up with them. There is still a lot of space for Shandong to improve and that will provide opportunities to foreign companies to get in and introduce their products, services, and expertise to local companies and farmers. Like Dutch vegetable seeds have done successfully in Shandong for 15 years, Dutch potato seeds, supplies for protected cultivation like substrates, Dutch biological control solutions, and also training projects have gained positive recognition from companies and farmers.

As agriculture has been given the top priority for a long time, government at different levels are motivated to promote agriculture. In recent years, there is increasing demand for high-tech agricultural equipment to set up pilot or demonstrative projects in almost all city-level regions in Shandong. In this sense, Dutch high-tech solutions may have opportunities in such government support projects, for example pilot and demonstration parks are normally in need of glass houses or even intelligent glass houses. However, there is still a long way to go for selling intelligent glass houses to business entities, which have to seriously consider the big investment and return on investment of a modern green house.

Besides physical products, knowledge transfer can also provide opportunities to Dutch companies. The Dutch company GreenQ already has a good cooperation with Shouguang Vegetable Industry Group to optimize their vegetable production. This can be a good example and be copied to other regions and companies to help agro-enterprises improve with Dutch expertise.

10

Regulation

There are several governmental authorities and a number of regulations related to agro-business in China. Relevant regulations can be checked on the following website.

1. *Agriculture Ministry*
Supervision on general agricultural production
www.moa.gov.cn
2. *Administration for Industry and Commerce (AIC)*
Supervision on the market of agro-products
www.saic.gov.cn
3. *State Food and Drug Administration (SFDA)*
Supervision on the access to the market for agro-products
www.sfda.gov.cn
4. *General Administration of Quality Supervision, Inspection and Quarantine (AQSIQ)*
Supervision on quality and safety of agro-products
www.aqsiq.gov.cn
5. *Ministry of Commerce*
Supervision on import and export of agro-products
www.mofcom.gov.cn

11

Major Fairs

1. China (Shouguang) International Vegetable Technology Expo

Website: www.sgcbh.com

Venue: Shouguang International Exhibition Center

Organizer:

- Ministry of Agriculture of China
- Ministry of Commerce
- China Council for the Promotion of International Trade (CCPIT)
- Shandong People's Government
- China Academy of Agriculture Sciences (CAAS)

The Expo is the largest and most influential vegetable expo in China. The first exposition started in 2000. It has a total show area of 450,000 m², including 160,000 m² in-house area. The exposition has 13 areas, demonstrating the achievements of China's agriculture industry.

Dutch companies have been participating in this expo for many years, including Rijk Zwaan, Beijo and Koppert.

2. China (Shandong) International Agricultural Machinery Exhibition (CIAME)

Website: www.sdneyjxz.com

Venue: Jinan International Exhibition Center

Organizer:

- Shandong People's Government
- China Machinery Industry Federation

CIAME is a large scale and a high-level exposition about agricultural machinery in Shandong. The first expo was organized in 2006. Many agricultural machinery manufacturers both domestic and from abroad participated in past exhibitions, including Weichai, Lovol, Yanmar, Changlin, etc.

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