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Exporter Guide

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Report Highlights:

In 2003, China Customs reported imports of over \$19.6 billion of agricultural and fisheries products (not including forest products). U.S. Customs reports agricultural and fisheries exports of roughly \$5.19 billion to China. As incomes continue to rise, imports are also likely to continue. Processed and RTE foods continue to gain ground as wealthy urban consumers seek new ways to save time. Beef and poultry suffered severe setbacks due to BSE and AI related trade barriers.

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Unscheduled Report
Shanghai ATO [CH2]
[CH]

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Section I.

I.1. Economic Situation

China's economy continues to grow rapidly, with GDP increasing by 11.4% in 2003 and posting a growth rate of 9.7% in the first half of 2004. This growth has been supported by continued high levels of foreign direct investment and exports. The Chinese government has become concerned that such rapid growth could kick start a round of inflation, and is now trying to cool the economy down to a growth rate in the range of 7%. Inflation fears have been stoked by rising prices for basic foodstuffs, construction materials and petroleum. As part of its effort to cool the economy, the government has instructed banks to cut back on loans, and has withheld approvals for a number of major projects. Home mortgages have not been affected by the policies, and are a growing part of the banking industry's business. Concerns about a real estate bubble in China's largest cities appear to be receding as price increases flatten out. Despite the government's best efforts, growth appears likely to continue at high levels. In 2005, China will permit full foreign ownership of enterprises in China, and liberalize distribution rights. This is likely to attract increased investment from foreign firms who may be hesitant to form joint ventures.

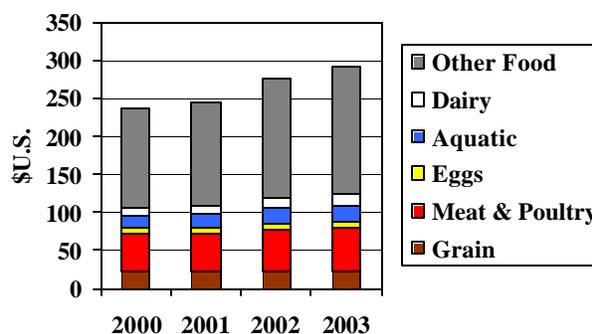


I.2. Demographic Developments

Although China has relaxed restrictions on the movement of rural residents, the largest cities continue to restrict employment and housing for unlicensed migrants. In addition, production costs in the major metropolitan areas have risen rapidly. The result has been a boom in the growth of second and third-tier cities across China, particularly in developed coastal areas such as Guangdong, Zhejiang and Jiangsu provinces. Many of these often-overlooked emerging city markets have populations in the millions, with average incomes that are rapidly approaching those of cities like Beijing, Shanghai or Guangzhou. Several of these cities are profiled in Emerging City Market reports, which are available on the FAS website, and a general profile is available in the report [Emerging Markets in East and Central China](#) (CH3818). Those interested in Chinese markets should also keep an eye on the government's drive to build new cities to relieve the population pressure on major cities. The flagship project for this policy is a planned community for 700,000 people being constructed just an hour's train ride from Shanghai.

Another important demographic element is generational. The population currently is divided into three groups: those born in 1946-1964, who have lived through some of China's most turbulent times; those born 1965-1976, who came of age during China's drive to development; and those born after 1976, who have grown up in an increasingly affluent and stable environment. While there are significant

**Annual Food Expenditures
(Urban Households)**



differences between the first two groups, they share similar spending habits, i.e., being extremely price sensitive and conservative about spending. The most recent generation of consumers is different, having embraced a consumption-oriented lifestyle. They are more willing to spend money, willing to experiment, are much more style conscious, and are more sensitive to advertising. These consumers are gaining rapidly in importance, as they become income earners in their own right.

I.3. Consumer Buying Habits

Total consumer expenditures increased by 7.9% in 2003, significantly faster than in 2002. This despite the impact of SARS, which kept consumers out of crowded shopping venues for several months. Long-term consumption is expected to grow. China's increasingly wealthy citizens have limited vehicles for investment and low interest rates for home loans, a situation that encourages consumers to spend or to put their money into homes. Government efforts to slow the economy down may put a slight dent into growth, but only to a limited extent.

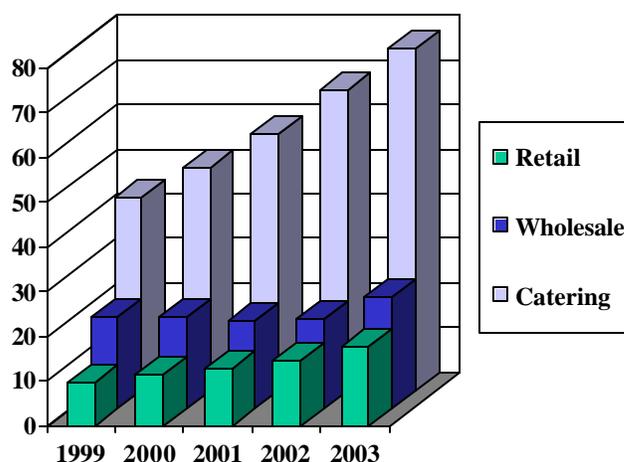
Generational distinctions aside, Chinese consumers tend to be conservative and price sensitive when it comes to personal spending. Exceptions to this rule include spending on education, medical care, gifts and entertainment, and children. The greatest successes for high-end U.S. food products have been those aimed at hotels and restaurants (seafood and beef, for example), and high-end products given as gifts (fresh fruit, wine and chocolate). Acceptance of imported products as high-quality is becoming more common, and U.S. products have benefited from a reputation for high quality.

I.4. Consumer Foods Market Size and Growth

The total value of the Chinese food market has continued to grow at a rapid clip. This trend was bolstered even further in 2003, as mild deflation in food prices turned into inflation: price changes for the years 2000 – 2003 were 2.6%, 0%, -0.6% and 3.4%, respectively (China Statistical Yearbook, 2004).

Combined wholesale and retail (excluding tobacco and liquor) and catering sales, amounted to \$119 billion in 2003, according to official statistics. In a nation where food is a national obsession, it is not surprising that the food sector is dominated by catering. Catering (including restaurants) accounted for roughly 64% of the combined total. Note, however, that direct comparison of catering revenues with retail and wholesale food sales tends to give an exaggerated impression of the catering sector's size: catering revenues include revenues from liquor sales, among other things. The retail and catering sectors have grown steadily, while wholesale stagnated until recently. This reflects the rapid development of modern retail formats and a growing trend in favor of dining out on the one hand, and long-term consolidation in wholesale markets on the other.

Total Sales, by Sector
(value in \$billion)



Source: China National Statistical Bureau, 2004 Yearbook
Tables 17-10 and 17-12

I.5. Advantages and Challenges Facing U.S. Suppliers of Food Products to China

Advantages	Challenges
Chinese consumers spend nearly half of their disposable income on food and beverages.	Chinese consumers are price-sensitive: imported products have difficulty competing with domestic substitutes on price.
Imported goods are generally regarded as high in quality	Imports are regarded as luxury goods: the vast majority of consumers do not believe they can afford them.
New markets for imported products are appearing in fast-growing cities throughout China.	Transportation and logistics for these cities remains difficult, and many lack the presence of a qualified distributor for imports.
Many U.S. brands, such as Budweiser, Coca-Cola, M&Ms and Pringles are widely recognized in China.	Most of the U.S. brands widely available in China are manufactured locally or in other parts of Asia.
Overseas fast-food chains are extremely popular, and provide exposure for foreign foods.	Foreign fast-food chains source most of their products locally.
Overseas retail chains are growing quickly, and carry more imported products than domestic counterparts.	Few of these chains import directly from overseas, working instead through distributors. Many charge high listing fees to promote new products.
Overseas retail chains and convenience chains are increasingly interested in establishing house brands. This is creating opportunities for bulk shipment of quality foods.	Although interested in quality for their house labels, these chains are tough negotiators, and will leave suppliers with little room for profit.
Under WTO, China's duties on imported foods have fallen, and more products are shipped directly to China, instead of through Hong Kong.	Increased access for imports has resulted in greater competition from other exporting countries for products like beef, seafood and pistachios.
Food is an essential part of Chinese culture and social life. Key life events revolve around food, and little expense is spared.	The Chinese have very strong taste preferences. While they are willing to experiment, they are less willing to incorporate foreign tastes into their daily life.
China is incomprehensibly large. Though many consumers still lack the income to purchase imports, millions join the middle class every year.	China is incomprehensibly large. Regional differences in culture and taste can be quite stark. Promotions with limited budgets must target specific groups.
The Chinese market often moves en-masse. If a product becomes trendy, sales can skyrocket overnight.	If a product is successful, it is likely to be counterfeited or imitated.

Section II. Exporter Business Tips**II.1. Local Business Customs**

China possesses an ancient and vibrant mercantile culture of its own. Although this culture values efficiency, value and profit, there are important differences from western business culture. Key features include: a) respect for age and hierarchical position, b) the importance of personal relationships, c) group orientation and d) the concept of face. Food is

a key component of Chinese culture, and this extends to business culture: working lunches and dinners are an important part of doing business in China. These events help to build those all-important personal relationships, provide information not available in formal business meetings, and are an opportunity to establish face with your business contacts. To help U.S. exporters on their travels in China, FAS has prepared several reports outlining the key points: [Chinese Business Etiquette](#) (CH2828) and [Business Travel in China](#) (CH2829). These reports are available on the FAS website at www.fas.usda.gov (look under 'Attache Reports').

II.2. Consumer Tastes

It is dangerous to assume anything about China. Tastes vary widely from place to place in China, and are constantly evolving. As a general rule, Chinese tastes favor Asian products, particularly those with a strong similarity to Chinese foods or heavily influenced by China. Nonetheless, consumers are willing to experiment with new tastes, and it is difficult to predict what products will succeed without conducting actual research. For example, pizza has proven immensely popular, despite a widespread myth that Chinese people do not like cheese. One promotion in the inland city of Wuhan found Mexican foods to be a runaway success, while another in Chengdu scored a success for boneless pork butt. Key regional distinctions include North and Northeast China (Beijing and north), where dishes tend to be salty; East China (centered on Shanghai) where the taste is sweet and spicy dishes are unpopular; Central China (Sichuan and Hunan), famous for hot and spicy food; and South China, famous for delicate tastes, seafood and an appetite for the exotic. Keep in mind, though, that consumers in any of these places may be willing to experiment with new tastes.

In addition to regional patterns, there are some overall preferences shared by most Chinese consumers:

- Chinese prefer fresh meats and produce to canned or processed ones. Many buy fish or fowl live to be butchered on the spot.

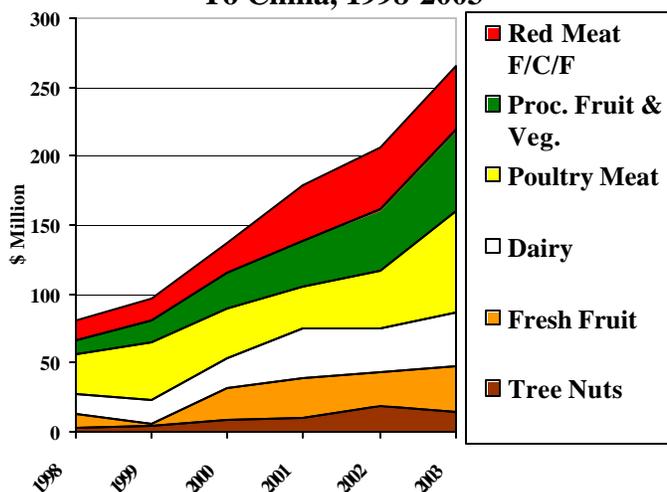
- Consumers prefer small-sized packages to 'economy' sizes, even though the unit cost may be higher.

- In the case of snacks, candies or breakfast cereals, Chinese consumers like to see the actual product inside the package. It is a good idea to include a transparent 'window' on the package. This goes double for new-to-market products.

- The attractiveness of the package is important. Size, colors and design are all taken into consideration.

- Chinese buyers are attracted to established brand names, which are seen as a guarantee of authenticity and superior quality.

**Top U.S. Consumer Food Exports
To China, 1998-2003**



Before jumping into the Chinese market, U.S. exporters are advised to invest in targeted market research and taste testing. In a country the size of China, it is

absolutely critical to identify a specific target group of consumers, and confirm the product's appeal to that group. For example, one might target new mothers in the Shanghai area, or, alternatively, teens from affluent families in Guangzhou. Whichever group one chooses to target, both the product and the approach will be entirely different. Failure to take the preferences of Chinese consumers into account is a common reason for the failure of new products.

II.3. Regulatory Framework

Over the past few years, the Chinese government has published a host of regulations governing standards and labeling for food products. Enforcement of these regulations is also becoming more rigorous. Although reputable distributors often deal with these issues on the exporter's behalf, exporters with a major commitment to the China market are advised to study the relevant laws carefully and ensure that they are in compliance.

To help U.S. exporters understand these regulations, FAS has prepared a series of unofficial translations. Collectively, these reports are called the **China Food and Agricultural Import Regulations and Standards Report** (or **China FAIRS Report**). The translations available are listed in the FAIRS Report Working Index, which is posted on the FAS website (www.fas.usda.gov).

Section III. Market Sector Structure and Trends

III.1. Food Retail

Growth in retail sales has been driven by the rapid development of food retail chains across China. Supermarket chains are now present in virtually every city in China, while hypermarkets exist in most large cities. Of particular interest to exporters is the rapid growth of foreign-invested hypermarket chains such as Wal-Mart, Carrefour and Metro, which are aggressive in seeking out and promoting high-margin imported products. In addition, many of these chains are moving toward centralized purchasing. UK-based Tesco recently purchased HyMall, a Taiwan-based hypermarket chain with a large number of outlets in Eastern China, giving them a foothold in China. Foreign-invested stores are popular venues for buying food to be given as gifts. Packaging is critical in this particular niche, and many exporters and/or distributors have developed special gift package versions of their products. China's packaging industry is extremely sophisticated, and a growing number of U.S. exporters are choosing to ship in bulk and pack their products in China, a practice that may also help to resolve product labeling issues.

In response to the growth of foreign-invested retailers, Chinese retail chains are consolidating, and now have nationwide reach. Although the recent consolidation of China's two largest food retail chains, Lianhua and Hualian, created an entity several times larger than any other chain operating in China, the two retailers appear to be continuing to operate independently. Both had previously absorbed a large number of smaller chains, and are still incorporating them into their management structure. Domestically-owned hypermarkets are a reasonable prospect for imported products, but loose management of supermarket chains continues to make that sector a weak prospect for imports beyond dried fruit, nuts and frozen vegetables.

Retail sales have also been boosted by the rapid growth of convenience store chains, particularly in East China. Shanghai alone is home to as many as 3,000 convenience stores, mostly domestic chains. Foreign-invested convenience stores have established a significant presence in Guangzhou, and the convenience store format is now making an appearance in Beijing. Management of these chains is strong, and most rely on centralized purchasing and

distribution. These stores also rely less on deep discounting, making them a reasonable prospect for imported products. An ATO/Shanghai sponsored food promotion with Lawson's convenience stores will include a wide variety of U.S. products, including Alaska Salmon. Refrigerator and freezer cases are routinely available in hypermarkets, supermarkets and convenience stores, and microwave ovens are common in convenience stores. USDA's Cold Chain Initiative, supported by ATOs in Shanghai and Guangzhou is further helping to ensure that the quality of temperature sensitive imports can be maintained, creating opportunities for new products.

Retail growth is likely to get a boost in 2005, when China will permit full foreign ownership of businesses (current rules require foreign-invested businesses to be joint ventures). Wal-Mart is rumored to have plans to open stores in Shanghai and other cities in 2005, and has already established a procurement center in Shanghai. Other important trends in the retail sector include the rapid increase in personal ownership of refrigerators, freezers and microwave ovens, which has boosted sales of frozen and heat-and-eat products. Hypermarkets and convenience stores also now offer a wide variety of ready-to-eat foods, including box lunches and rotisserie chicken. For more detail on China's retail food sector, please refer to FAS/China's **Food Retail Sector** reports, available on the FAS website at www.fas.usda.gov.

III.2. Hotel, Restaurant and Institutional (HRI)

HRI is one of the most dynamic sectors of the economy, as seen in the rapid growth of revenue for the catering industry. This sector covers the entire spectrum, from roadside stands to massive cafeterias to world-class gourmet restaurants. The restaurant sector dominates HRI, accounting for roughly 60% of HRI revenues. Privately owned restaurants account for over 50% of the total, and helps to account for the dynamism of this particular sector. Growth is supported by the emergence of a growing number of affluent, two-income families that do not have the time to prepare meals at home, as well as long-standing traditions of hospitality.

HRI is a key player in introducing imported foods. High-end restaurants and hotels are less constrained by price considerations and more interested in presenting dishes and products that are unique. If successful, their efforts are likely to be copied by other restaurants, bringing them closer to mainstream middle-class consumers. Another important trend is the recent emergence of medium to high-end restaurant chains. Like other high-end restaurants, these are interested in offering consumers something different and unique, but unlike them, if a product is successful, they can purchase in the quantities necessary to bring unit costs down. This development holds a great deal of promise, as Chinese consumers view restaurant chains as a guarantee of quality in a largely unregulated industry. Though still in its infancy, this trend may become an important factor for imports.



It is important to note that many parts of the HRI sector are not strong candidates for imported foods. Catering operations that run cafeterias and provide box lunches as well as small family-owned restaurants, account for a large portion of the industry and are extremely price-sensitive. For example, lunch box manufacturers typically aim for a production cost of \$0.75 or less, making them a poor candidate for most imported foods. Even here, however, there are exceptions. ATO/Shanghai's convenience store promotion at Lawson's will feature Alaska Salmon in

Japanese-style lunch boxes. Lawson's strong focus on high-end malls, retail venues and office buildings makes this a practical venture. Once again, exporters are advised to research the market and pick their targets carefully. For a more analysis on China's HRI sector, please refer to FAS/China's **HRI Sector** reports, available on the FAS website at www.fas.usda.gov.

III.3. Food Processing

The food processing industry is another of the fastest growing segments in the Chinese economy, with the China Food Industry Association citing annual growth of 10-12%. Still in its infancy, the recent development of this sector also makes it is one of the most modern. Poor regulation, however, makes it difficult to determine the exact size of the industry. Official statistics indicate that there were 4,636 food processing enterprises with a total output of \$27.69 billion, growing by roughly 16% over the previous year. This number is likely understated, missing the extremely large number of small, unregistered food manufacturers throughout China, particularly in rural areas. It also disagrees sharply with other official statistics that placed the value of the food processing at over \$102.7 billion in 2000. The difference may be the result of different counting systems; the latter figure includes beverage manufacture and primary processing as well as food manufacturing, estimating food processing at 22% of the total value. Currently, only 30% of China's food consumption is processed, as compared to 86% in more developed countries. According to Chinese officials, the main barrier to further development of this sector is China's underdeveloped agricultural production and distribution systems.

Food safety has become a major concern for the Chinese government, after a series of poisoning and contamination incidents culminated in a major scandal over sales of substandard infant formula, which resulted in the deaths of a number of infants. Food contamination incidents get widespread media coverage, and have become a fixture in many consumers' minds. Many will now buy food only from well-known and reputable manufacturers, and some manufacturers have opened their own retail stores or booths in order to prevent adulteration of their products. Government efforts to improve quality and inspection of food manufacturing facilities are likely to accelerate the trend toward consolidation.

The food processing sector provides growing opportunities for U.S. exporters. The industry is concentrated primarily in Guangdong province, though much of the current growth is taking place further north. Although inputs are primarily domestic, many processors are seeking new ingredients to help distinguish their products from competitors. U.S. products that have been particularly successful in this area include nuts (almonds and pistachios), dried fruit (particularly raisins and prunes), flavorings and sauces (blueberry flavors have become popular recently) and dairy ingredients and supplements. ATOs in Shanghai and Guangzhou have launched or plan to launch a series of seminars for Chinese bakeries, promoting the use of U.S. food ingredients, and baking ingredients continue to be one of the best export prospects. Frozen and dehydrated potato products continue to be successful, due largely to the lack of local equivalents. For a more in-depth analysis of the food processing sector, please refer to FAS/China's **Food Processing Sector** reports, available on the FAS website at www.fas.usda.gov.

Section IV. Best High-Value Product Prospects

Product Category	2000 Market Size	2000 Imports (\$million)	5-Yr Avg Import Growth	Import Tariff Rate	Key Constraints on Market Development
Red Meats Fr/Ch/Fz	NA	156	66%	12 – 25%	Competition from other import sources (Australia), limited capacity for handling fresh imports, growing competition from domestic product.
Processed Fr. & Veg.	NA	134	46%	5 – 30%	Competition from Asian countries with similar tastes; rapid development of domestic industry.
Poultry Meat	NA	481	53%	20% (specific duties are applied to broiler cuts)	Import quotas, sanitary barriers, competition from other exporting countries.
Dairy Products	NA	260	40%	6 – 20%	Competition from New Zealand and Australia.
Fresh Fruit	NA	318	12.5%	10 - 30%	Competition from domestic products. U.S.' advantage is in special varieties.
Tree Nuts	NA	23	39%	0 – 25%	Competition from low-price, low quality exporters; counterfeit products.
Fruit & Veg. Juices	NA	14	32%	7.5 – 30%	Competition from other exporting countries.
Breakfast Cereals	NA	3	10%	20 – 30%	Breakfast cereals are still a novelty in China.
Salmon	NA	25	61%	10 – 14%	Cost and competition from other exporters, esp. Norway.
Crustaceans	NA	216	17%	5 – 19.2%	Limited supplies.
Note: All data are derived from U.N. Trade Data. Commodity groupings are based on FAS BICO report categories.					

Section IV. Key Contacts and Further Information

For a list of Chinese government regulatory agencies in Beijing, Shanghai and Guangzhou, please see FAS/China report number CH1068, available on the FAS website at www.fas.usda.gov.

For a list of importers and distributors, please see FAS/China report number CH1068, also available on the FAS website.

For further information, please contact the appropriate ATO office. FAS/China has ATOs in Beijing, Shanghai and Guangzhou. E-mail and fax numbers are as follows:

ATO Beijing: ATOBeijing@usda.gov, (8610) 8529-9962

ATO Shanghai: ATOShanghai@usda.gov, (8621) 6279-8336

ATO Guangzhou: ATOGuangzhou@usda.gov, (8620) 8667-0703

Appendix 1. Statistics

Table A. Key Trade and Demographic Information

Agr. Imports From All Countries (2002) (\$mil)/US Market Share (%)	10,886/24%
Consumer Food Imports From All Countries (\$mil)/US Market Share (%)	2,256/34%
Edible Fishery Imports from All Countries (\$mil)/US Market Share (%)	1,574/6.7%
Total Population (millions)/Annual Growth Rate (%)	1,292/0.6%
Urban Population (millions)/Annual Growth Rate (%)	524/4.3%
Number of Major Metropolitan Areas (pop. over 1 million)	174
Size of Middle Class (Millions)/Growth Rate (%)	NA
Per Capita Gross Domestic Product (US Dollars)	1,100
Unemployment Rate	4.3%
Per Capita Food Expenditures (urban residents only; rural exp. NA)	292
Percent of Female Population Employed	NA
Exchange Rate	8.3
(Source: China Statistical Yearbook, 2004, except import statistics which are from UN Data sources)	

Table B. Consumer Food and Edible Fishery Product Imports

China (Peoples Republic of) Imports of Agriculture, Fish & Forestry Products
(In Millions of Dollars)

	2000	2001	2002
CONSUMER-ORIENTED AGRICULTURAL TOTAL	1960	2120	2,256
Snack Foods (Excl. Nuts)	64	68	69
Breakfast Cereals & Pancake Mix	3	3	4
Red Meats, Fresh/Chilled/Frozen	156	154	200
Red Meats, Prepared/Preserved	8	8	10
Poultry Meat	481	444	426
Dairy Products (Excl. Cheese)	260	273	281
Cheese	4	4	6
Eggs & Products	10	7	5
Fresh Fruit	318	287	276
Fresh Vegetables	4	3	3

Processed Fruit & Vegetables	134	276	260
Fruit & Vegetable Juices	14	22	55
Tree Nuts	23	52	61
Wine & Beer	121	93	76
Nursery Products & Cut Flowers	21	22	33
Pet Foods (Dog & Cat Food)	1	2	2
Other Consumer-Oriented Products	338	402	486
FISH & SEAFOOD PRODUCTS	1210	1319	1,574
Salmon	25	56	49
Crustaceans	216	194	198
Groundfish & Flatfish	410	507	824
Molluscs	177	177	273
Other Fishery Products	381	385	220
AGRICULTURAL PRODUCTS TOTAL	9961	10546	10,886

Source: United Nations Statistics Division

Table C. Top 15 Suppliers of Consumer Foods and Edible Fishery Products

	1999	2000	2001	2002
Consumer-Oriented Agricultural				
World	1,490,913	1,947,689	2,089,873	2,256,004
United States	470,353	635,982	670,675	767,122
Thailand	91,330	118,154	239,779	233,633
New Zealand	91,231	145,587	150,790	188,547
Australia	41,282	63,897	82,505	99,399
Vietnam	12,273	16,688	65,517	90,993
Japan	68,438	88,635	82,150	85,720
Canada	45,451	70,530	76,758	75,329
Philippines	49,659	77,112	66,554	67,911
France	41,401	78,031	70,162	57,228
Netherlands	90,153	128,755	75,395	49,537
Singapore	10,572	16,952	16,175	48,130
Germany	16,251	20,946	29,482	44,832
Chile	10,119	25,147	31,616	40,210
Brazil	74,120	7,428	12,136	35,547
Ireland	19,798	35,119	45,734	34,193
Taiwan (Estimated)	29,729	32,659	26,844	32,618
Denmark	25,282	39,934	42,370	29,849
Korea, Republic of	19,287	21,331	23,457	29,663
Indonesia	45,276	24,869	28,224	24,388
Belgium	7,765	9,116	22,446	22,680
Rest of World	231,083	290,782	231,065	198,416
Fish and Seafood Products	1999	2000	2001	2002
World	889,508	1,217,062	1,337,435	622,676
Russian Federation	257,727	345,895	487,916	622,676
Korea, North	5,757	4,056	48,019	143,243
United States	55,040	79,753	100,456	105,848
Japan	185,010	136,583	106,883	100,528

Canada	35,055	77,207	64,335	79,475
Norway	19,468	42,550	63,710	63,480
India	12,191	87,157	77,886	49,969
Korea, Republic of	35,390	67,019	44,796	38,933
New Zealand	12,149	26,448	26,977	38,314
Thailand	10,239	41,787	27,364	24,359
Denmark	7,483	12,014	11,097	22,390
Singapore	4,963	10,184	7,718	19,399
Spain	17,405	28,042	25,989	18,768
Indonesia	4,938	23,182	24,583	18,105
Argentina	35,877	17,268	15,139	17,984
Peru	354	2,097	2,848	13,873
Iceland	7,128	10,050	16,504	12,537
Greenland	2,379	5,318	10,223	12,388
France	44,941	10,647	8,107	12,373
Vietnam	3,848	3,773	9,034	12,329
Rest of World	132,153	186,027	157,845	147,388

Source: United Nations Statistical Division. 2003 data not yet available.