

# **PORKBRAND**

## **WP1: Mapping present sales channels for pork in China**

---

*Report*

*By Susanne Pedersen<sup>1</sup>, Klaus G. Grunert<sup>1</sup> & Yanfeng Zhou<sup>2</sup>*

<sup>1</sup> MAPP Centre, Department of Management, Aarhus University, Denmark

<sup>2</sup> Business school, Sun Yat-sen University, People's Republic of China

This report is an outcome of the first work package in the PorkBrand project (2019-2020), which is funded by Svineafgiftsfonden (*Muligheder for branding af dansk grisekød på det kinesiske marked*). It is led by Klaus G. Grunert with participation of Yanfeng Zhou, Hanne Kragh, Karen Brunsø, Stephan Zielke and Susanne Pedersen. The advisory board consists of Søren Tinggaard, Vice President, Danish Crown and Nicolaj Christoffersen, Head of Sector, Danish Agriculture and Food Council. The advisory board has not been involved in writing or commenting on this report.

## Table of Contents

<b>1. INTRODUCTION .....</b>	<b>4</b>
<b>2. METHODS.....</b>	<b>5</b>
2.1. DESK AND INTERNET RESEARCH .....	5
2.2. STORE VISITS .....	5
2.2.1. <i>Physical retail stores</i> .....	6
2.2.2. <i>Online retail stores</i> .....	7
2.2.3. <i>Food service</i> .....	8
2.3. CONSUMER SURVEY.....	9
<b>3. PORK BRANDS IN CHINESE SALES CHANNELS .....</b>	<b>10</b>
3.1. MAIN PORK BRANDS IN CHINA .....	10
3.2. RESULTS FROM VISITS IN PHYSICAL RETAIL STORES.....	13
3.3. RESULTS FROM ONLINE STORES.....	18
3.4. RESULTS FROM FOOD SERVICE .....	22
3.5. CONSUMER PERCEPTION OF PORK BRANDS AND USE OF SALES CHANNELS .....	24
3.6. BRANDS ACROSS SALES CHANNELS .....	28
<b>4. CONCLUSION .....</b>	<b>29</b>
APPENDIX 1 DATA COLLECTION SHEETS .....	31
APPENDIX 2. CONSUMER SURVEY .....	37
APPENDIX 3: PHOTOS OF PORK BRANDS FROM MAIN PORK BRANDS IN CHINA .....	47
APPENDIX 4. MAP OF CHINA'S PROVINCES .....	50

## 1. Introduction

The purpose of the Porkbrand project's first work package is to support branding of Danish pork meat in China by providing knowledge about current branding practices on the Chinese market for pork meat, branding strategies and activities currently used, and Chinese consumers' perception and brand awareness of the main pork brands.

The background for the project is that China has become an important market for Danish pork meat. Even though China has the world's biggest production of pork meat, domestic production cannot keep up with the demand. Hence, import of pork meat in China has been increasing. Chinese consumers have more trust in imported meat than domestic meat, and consumers are willing to pay a price premium. Therefore, branding of pork meat to the end-consumer can increase the revenue and the sales of Danish pork meat in China. Lately, there have been efforts to brand the meat towards the Chinese end-consumer: The meat has (with support from EU) been branded as "European pork meat" and there have been some experiments with co-branding with food service companies.

Traditionally, export has been in bulk to Chinese meat importers, with limited knowledge on the Danish side on how the meat is used further down the value chain and no possibilities for consumer branding. However, more recently 9% of Danish Crown's pork export to China has been sold directly to retailers, on-line stores, and food service companies, all of which allow branding to the end user. The opening up of Danish exports of processed pork products to China, and the opening of a Danish Crown processing plant in China (turning Danish raw material into fresh and processed products aimed at selling to retailers, online stores and food service) in 2019 will result in considerably more branding opportunities.

Branding is a very important marketing parameter on the market for fresh meat and processed meat in China, where it is common that the same retailer carries several brands of pork in the same store, differentiated in terms of price and quality. As an example, for one of the most developed tier 1 cities, the total market for Shanghai is 1.2 mill. tons of pork. The majority – about 50% – are still sold as fresh pork at wet markets. The rest is sold in Western style retail chains (hyper- and supermarkets), on online platforms or as food service products. The market for branded products in the retail sector is estimated to cover 30% of the retail sales. Thus, the market for branded pork in Shanghai alone will be in the area of 50,000 tons/year.

To secure continued sales growth of Danish pork meat on the Chinese market, it is crucial that the Danish pork sector has access to knowledge about which branding strategies are most suitable on the Chinese market. At the same time, sales channels in the Chinese market are developing rapidly,



providing consumers with many channels (such as super markets, wet markets, online and food service). In a branding context, multiple channels can be a challenge, since different sales channels can impact consumers' brand associations contributing to possibly diverging brand images in the mind of the consumer. Hence, it is important to know how to successfully manage multi-channel branding to ensure a strong brand image across sales channels.

An overall branding strategy implies an overall brand positioning and its implementation by means of marketing parameters. In this explorative work package, we characterize both the overall brand positioning and its implementation by use of major marketing parameters for the most important Chinese pork brands in three sales channels: retail stores, online stores and food service (limited to chain restaurants, where pork is an important element on the menu).

## 2. Methods

To get an overview of the main pork brands in the Chinese market and their branding strategies and activities in and across different sales channels, a mixed methods approach consisting of desk research, internet research, store visits and a consumer survey was adopted. Local data collection was carried out in Guangzhou, Shenzhen and Shanghai, in accordance with the aim of the Porkbrand project to focus on 1<sup>st</sup> tier cities in Eastern China. Even though a large part of pork meat is sold on wet markets, this channel was not included, as this type of pork is – most often – sold unbranded. The different data collection methods will be explained in more detail below.

### 2.1. Desk and internet research

The aim of the desk and internet research was to identify the main pork brands in the Chinese market and what the brands are doing in terms of push and pull marketing activities to position themselves. To this end, a thorough desk and internet research was conducted by the Chinese research team in March 2019. By searching for pork brands in China, a list of pork brands was compiled and the main pork brands were selected based on availability in stores/online (especially in the three target cities), product range, sales volume and branding activities.

### 2.2. Store visits

The aim of the store visits was to document the brands available in those stores, the type of products bearing the brand, the way the brand was presented and brand-related activities more generally.

A data collection sheet was constructed for each channel. The first drafts of the three data collection sheets were discussed during a joint research meeting in China, and were tested in an initial data collection for all channels in Guangzhou and Shanghai. After these visits and more discussions, the data collection sheets were finalized (see Appendix 1a-c). The details for each data collection sheet are presented below.

### *2.2.1. Physical retail stores*

The data collection sheet for the retail stores was designed to register the different pork brands in the store, type of brand (private label, producer branding, local branding, origin branding) pork product types (fresh warm, fresh chilled, prepacked, frozen), number of cuts for each brand, and product packaging (no packaging, MAP, vacuum packed, wrap pack). In addition, the pork brands' logo, slogan, labels (animal welfare, organic etc.), pictures on packaging and price (for 500 g of either ribs, streaky pork, lean meat) were registered. At last, the position of the pork counter in the store, shelf space for each brand, and each pork brand's promotion activities in the store were registered (please see the sheet in Appendix 1A).

Retail stores for the store visits were selected to cover a variety of stores, namely supermarkets, hypermarkets, convenience stores and imported goods stores. A *supermarket* is a large self-service shop selling foods and household goods, while a *hypermarket* is a “superstore” combining a supermarket and a department store, which, in principle, allows customers to satisfy all their routine shopping needs in one trip (often suburban location due to the size of the hypermarket and easy access with car). A *convenience store* is a smaller shop with a limited range of household goods and groceries at a higher price than in supermarkets, but serving more locations and having longer opening hours. *Imported goods stores* are (often) smaller stores featuring mainly imported goods. A list of retail stores in Guangzhou, Shenzhen and Shanghai was compiled and stores were selected from this list based on variety among store types and presence in the three selected cities. Classification of stores into the categories mentioned above was done jointly by the research team. It turned out that stores from the same retail concept needed to be classified differently across the three cities. For instance, AEON was classified as a supermarket in Guangzhou, while it was classified as a hypermarket in Shenzhen due to the greater variety of goods and the size of the store in Shenzhen. The stores visited can be seen in table 1.

**Table 1: Retail stores visited**

Store type	Guangzhou	Shenzhen	Shanghai
<b><i>Supermarket</i></b>	Fresh Hema	Fresh Hema	Fresh Hema
	7 Fresh	Carrefour	Carrefour
	Park n Shop	Rainbow	City shop
	AEON	Vanguard	Auchan
	Guangzhou Department store	Yonghui Super Species	
<b><i>Total</i></b>	<b>5</b>	<b>5</b>	<b>4</b>
<b><i>Hypermarket</i></b>	Walmart	AEON	RT-MART
		Sam's Club	Walmart
<b><i>Total</i></b>	<b>1</b>	<b>2</b>	<b>2</b>
<b><i>Convenience store</i></b>	Aunt Qian's fresh shop	Aunt Qian's fresh shop	H-life
	Thaiyoo	Jiajiale	Little Fresh Hema
		V24-seasonal fresh	
<b><i>Total</i></b>	<b>2</b>	<b>3</b>	<b>2</b>
<b><i>Imported goods store</i></b>	Ole	-	Freshmart
	Vanguard BLT	-	Greenland Direct Global Goods
<b><i>Total</i></b>	<b>2</b>	<b>0</b>	<b>2</b>
<b><i>Total</i></b>	<b>10</b>	<b>10</b>	<b>10</b>

The research team visited the stores over the course of a few days in each city. The procedure was to enter the store, note down the basic information on the sheet (date, store type etc.), before locating the pork meat counters. There, the researchers counted the number of different pork brands, took pictures of their logos and packaging and placement in the store, and registered branding activities such as instore videos, recipes, information about feeding. They also registered the types of pork cuts, product types and prices in store on the day.

### 2.2.2. Online retail stores

The data collection sheet for online stores (Appendix 1B), followed the same structure as for the physical stores, with minor adaptations, such that promotion activities also included links to social media and reviews from consumers on the homepage (if the online store permitted this). The reviews were coded as either positive or negative.

A list of the biggest online stores carrying pork products in China was compiled. Only online stores that offered their services in Guangzhou, Shanghai and Shenzhen were included to ensure compatibility with the part of the study dealing with physical retail stores. In China, many of the online stores are either owned by Alibaba or Tencent, and we wanted a mix of these stores, since they have different distribution systems and wholesalers, which also impacts the availability and price of

pork in the online stores. The following stores were deemed suitable for our study (\*Alibaba owned/invested, # Tencent owned/ invested):

- JD ([www.jd.com](http://www.jd.com))#
- Yihaodian ([www.yhd.com](http://www.yhd.com))\*
- Yiguo ([www.yiguo.com](http://www.yiguo.com))\*
- Suning Fresh ([www.suning.com](http://www.suning.com))#
- Miss Fresh ([www.missfresh.cn](http://www.missfresh.cn))#

Alibaba itself was not included, since it is mainly B2B and demands bulk buying. We intended to include Tmall (100% owned by Alibaba), but due to the spread of African swine fever in China, they were not selling any pork meat at the time of the data collection (March-April 2019).

Chinese research assistants visited the five online stores systematically searching for pork products and registered all the data in the data collection sheets and made screen dumps and pictures of the various brands and products.

### 2.2.3. Food service

The data collection sheet for food service can be seen in Appendix 1C. It was decided only to focus on food service outlets where pork is an important element on the menu. Both full-service restaurants and fast food restaurants, and both national and local restaurant brands were included. The menus/in-store displays, researchers were analysed for possible appearance of pork brands, and if possible, it was registered which dishes contained branded pork. In addition, researchers asked the staff about the origin and breed of the pork. Pictures were made to document the results.

Due to the many food service outlets in the three cities, it was decided to limit the visits to chain restaurants where pork is an important element on the menu. A preliminary screening with the help of Danish Crown resulted in the list of food service chains in Table 2.

**Table 2: Food service chains visited**

Guangzhou	Shenzhen	Shanghai
Jiu Mao Jiu (九毛九)	Ajisen (味千拉面)	Hefu Noodles (和府捞面)
KungFu (真功夫)	Café De Coral (大家乐)	Bi Feng Tang (避风塘)
Grandma's Diet (外婆家)	Xin Bai Lu (新白鹿)	Tsui Wah Restaurant (翠华)
Hai Di Lao (海底捞)	Green Tea (绿茶)	Shanghai Dim Sum (有心)

Charme Restaurant (港丽)	South Memory (望湘园)	
Jardin De Jade (苏浙汇)	JINCUI (金翠)	
6	6	4

During March and April 2019, the Chinese team visited the 16 food service providers (six in Guangzhou, six in Shenzhen and four in Shanghai) and registered their observations and documented with pictures. Out of the 16, two were fast food restaurants, while the remaining 14 were full-service restaurants.

### 2.3. Consumer survey

To understand use of and consumer preferences for different sales channels for pork meat, survey data from a project conducted for the Danish Agriculture & Food Council<sup>1</sup> was used. The part of the survey of relevance for the present purpose contained questions regarding:

- Frequency of buying pork in different sales channels. Respondents were asked about how often they bought pork in an open market, in a supermarket, online, in an imported goods store and in a pork brand store (on a 5-point scale from “One or more times a week” to “Never”). They were also asked about where of the five channels they bought pork most often.
- Awareness of pork brands. Here respondents were asked to indicate whether they had seen 11 different pork brands before. These were displayed with name and logo. They were also asked to indicate which two of the 11 brands they bought most often.
- Perception of pork brands. Here respondents were asked to evaluate the two pork brands, they had indicated to buy most often, on eight dimensions: safety, taste, price, quality, healthiness, trust, consistency and animal welfare.

The survey was developed in English, translated to Chinese and set up in Qualtrics (please see the full questionnaire in Appendix 2).

The online survey was conducted in March 2019 in Beijing, Shanghai, Guangzhou, Chengdu and Hongkong (first tier cities on the East coast of China) targeting 2000 female consumers aged 25-50 with experience of purchasing pork through traditional retail stores, online stores and food service providers. Only the data from respondents in Guangzhou and Shanghai are used here (n = 1209).

<sup>1</sup> Baseline survey from evaluation of the project 'Promotion campaign for European pork in China and Hong Kong 2019-2021.

### 3. Pork brands in Chinese sales channels

In the following, first, the main pork brands in China are presented and described (3.1). Then each sales channel is analysed separately describing how pork brands are presented in retail (3.2), online (3.3) and food service (3.4). Then, consumers' use of sales channels is described (3.5), and finally, a comparison of brands' branding activities and strategies off- and online (3.6).

#### 3.1. Main pork brands in China

The desk/internet research and discussions with experts on pork brands in the Chinese market resulted in a list of 38 brands. Based on the availability of the brands' products in the three target cities, their presence in the different sales channels, their product range and promotion activities, 11 were identified as main pork brands. All data collection (retail, online, food service and survey) was centred around these brands.

The 11 pork brands identified as the main brands on the Chinese market were: *Shuanghui*, *Yurun*, *Jinluo*, *Chumuxiang*, *Wens*, *Jingqishen*, *Sushi*, *NetEase Weiyang*, *Meal Boss*, *Cofco Joycome* and *Yihao Tuzhu*. Table 3 provides an overview of the 11 brands including a picture of their logo, their slogan, origin, price information for 500 g ribs (based on the desk/internet research and only looking at products not on offer), the main sales channels of the brand and a short description of the company. As Table 3 shows, all 11 main brands have logos. Four of them do not have a slogan, while seven do. Six out of seven have slogans emphasizing food safety (such as “Shuanghai cold pork, safe and reassuring”, “Eighteen tests, eighteen reassurances” (Jinluo)). Some slogans underlining food safety also incorporate general quality (Cofco Joycome), taste (NetEase Weiyang), health and organic production (Chumuxiang) and the production process (Yurun). Yihao Tuzhu is the only one underlining taste and hedonism (“I’m rustic, but I’m delicious”) without alluding to safety.












Headquarters of the 11 main brands are located in 7 different provinces. In addition, some brands have slaughterhouses/offices in other provinces as well (such as Jinluo and Meal Boss). Seven out of the 11 are located close to Shanghai, while 2 are located close to Guangzhou and Shenzhen. The 6 others are located in North-East, Mid-West and Mid-China (please see Appendix 4 for a map of China's provinces).

The desk research also covered price information for pork ribs, which is a very common and popular cut among Chinese consumers. On the day of the desk research, the price for 500 g of pork ribs ranged

from 20.8 to 150 RMB with an average of 45.16 RMB. Six brands had prices within the narrow interval of 20.8 to 24.8 RMB, while Jingqishen clearly had the highest price with 150 RMB followed by NetEase Weiyang with 68 RMB, Meal Boss with 60 RMB and Chumuxiang with 48 RMB. This big price difference among the brands can be attributed to the positioning of the brands as premium, such as Jingqishen, Meal Boss, NetEase Weiyang and Chumuxiang, who all supplies the popular and exclusive black pig breed.

The main sales channels (according to the information on the brands' webpages) are online stores (9 out of 11), supermarkets (8 out of 11), but also food service providers such as catering and food processing enterprises (4 of 11). Jingqishen and Meal Boss also supply high-end restaurants and hotels. Four out of 11 brands are also sold in community specialty stores (local convenience stores).

**Table 3. Main pork brands in China**

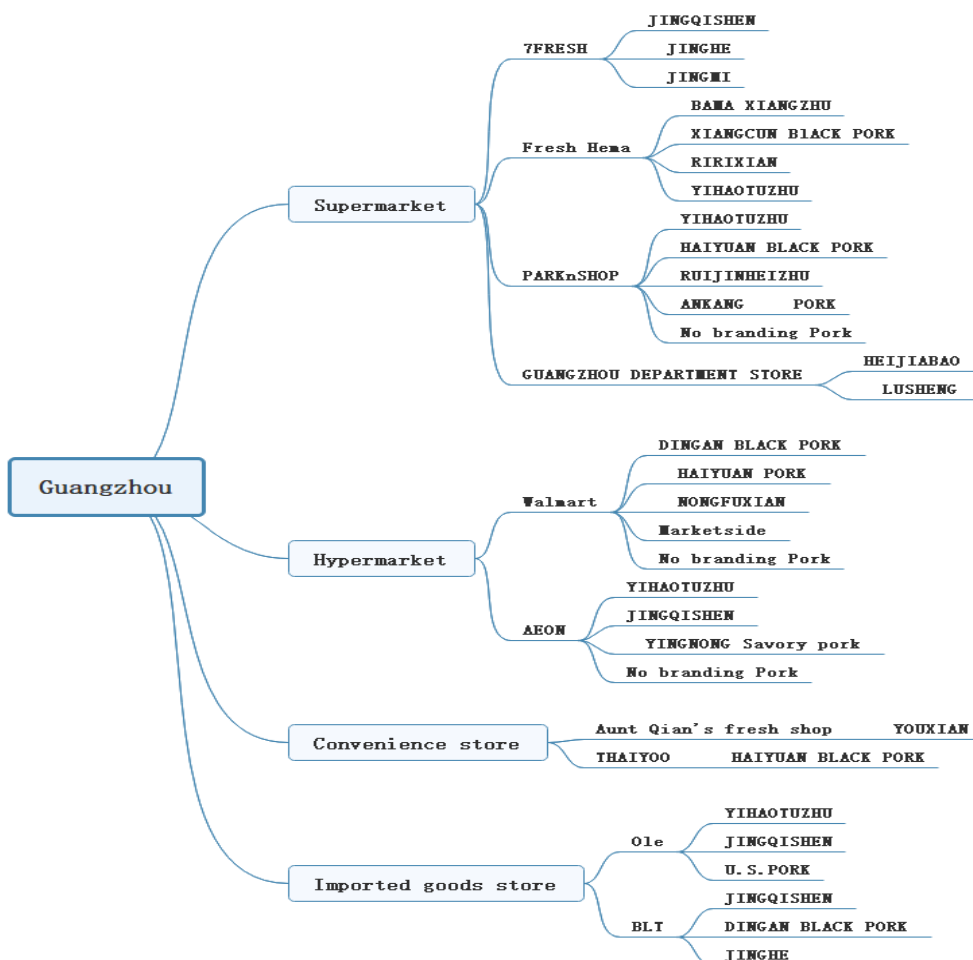
Brand name	Shuanghui	Yurun	Jinluo	Chumuxiang	Wens	Jingqishen	Sushi	NetEase Weiyang	Meal Boss	Cofco Joycome	Yihao Tuzhu
Logo											
Slogan	Shuanghui cold pork, safe and reassuring	Yurun cold pork, using the cold chain throughout the process, let tens of millions of families rest assured	Eighteen tests, eighteen reassurances	Health, Safety and Environmentally friendly farming	None	None	None	Let Chinese people eat safer and delicious pork and agricultural products	None	Five checkpoints to ensure safety, self-raised pork to ensure good quality	I'm rustic, but I'm delicious
Place of origin	Luohe, Henan province	Nanjing, Jiangsu province	Linyi, Shandong province Heilongjiang province, Neimongol province, Sichuan province	Sanmenxia, Henan province	Guangdong province	Changchun, Jilin province	Huaian, Jiangsu province	Anji, Zhejiang province	Jiaxing, Zhejiang province Yancheng, Jiangsu province	Jiangsu province	Guangdong province
Price for 500 g ribs, RMB	21.8	21.8	22.8	48	20.8	150	28	68	60	24.8	30.8
Main sales channels	<ul style="list-style-type: none"> <li>• Supermarkets</li> <li>• Catering enterprises</li> <li>• Online</li> </ul>	<ul style="list-style-type: none"> <li>• Supermarkets</li> <li>• Catering enterprises</li> <li>• Online</li> </ul>	<ul style="list-style-type: none"> <li>• Supermarkets</li> <li>• Catering enterprises</li> <li>• Online</li> </ul>	<ul style="list-style-type: none"> <li>• Online</li> <li>• Community speciality stores</li> </ul>	<ul style="list-style-type: none"> <li>• Supermarkets</li> <li>• Community speciality stores</li> </ul>	<ul style="list-style-type: none"> <li>• Supermarkets</li> <li>• High-end restaurants and hotels</li> <li>• Online</li> </ul>	<ul style="list-style-type: none"> <li>• Supermarkets</li> <li>• Catering enterprises</li> <li>• Food processing enterprises</li> <li>• Online</li> </ul>	<ul style="list-style-type: none"> <li>• Online</li> </ul>	<ul style="list-style-type: none"> <li>• Online</li> <li>• High-end restaurants and hotels</li> <li>• Community speciality stores</li> </ul>	<ul style="list-style-type: none"> <li>• Supermarkets</li> <li>• Community speciality stores</li> </ul>	<ul style="list-style-type: none"> <li>• Supermarkets</li> <li>• Online</li> <li>• Wet markets</li> </ul>
Short description of company	Shuanghui (now WH Group) is a publicly traded Chinese meat and food processing company. The company's businesses include hog raising, consumer meat products, flavouring products, and logistics. It is the largest pork producer in the world, and the largest meat producer in China.	Yurun Group Limited is the largest meat supplier in mainland China. It operates in two food sectors; chilled meat and frozen meat, and processed meat products.	Jinluo is the largest pig butchering and pork processing conglomerate in China. The company has established pork and poultry production and processing bases in various provinces across China.	Chumuxiang was first just an Internet brand, opening up online sales channels and operating together with offline sales. Later it became a permanent product brand. The brand focuses on green, safe and healthy food for consumers. The source of pork is the high-quality black pig breed, living in the natural environment of 400 thousand acres of barren hills, grazing and stocking, and growing period of more than ten months.	Wens is a modern agricultural leading and privately-owned enterprise. Wens initiated the "company and farmer" agricultural model that is now widely used in China, where the company provides a contracted farm with pigs, feed, and medicine.	Jingqishen has the black pig as a main feature of the brand. The pigs are fed with corn and other grains in the Changbai mountains. The company sells the largest share of black pig products in China. The products have passed organic product certification (such as COFCC and BCS).	Sushi pork is produced by Jiangsu Food Group and is mainly sold to consumers in the Yangtze River Delta. The brand focusses on monitoring the whole process from farm to store.	NetEase Weiyang is the agricultural brand of NetEase, focusing on the indigenous black pig breeds in China. To ensure the same quality of every product from farm to table, they produce pork in a fully controllable setting. The brand is mainly sold online and many people buy this pork as a gift to their friends.	Meal Boss positions itself as the "black pig expert". It owns the excellent genes of the Taihu pig and emphasises that the nutritional value of Taihu pork is higher than that of ordinary white pigs. It focuses on safety and quality through the whole value chain.	This pork brand comes from China National Cereals, Oils and Foodstuffs Corporation (COFCO), a large famous food company in China. The business includes feed production, hog production, slaughtering, the production, distribution and sale of fresh pork and processed meat products, and the import and sale of frozen meat products. Safety, freshness and convenience is in focus.	Yihao Tuzhu is one of the most popular pork brands in Guangdong. The brand has a special pork breed (aardvark pig, also called Chinese King Pig), which is considered safe and healthy.

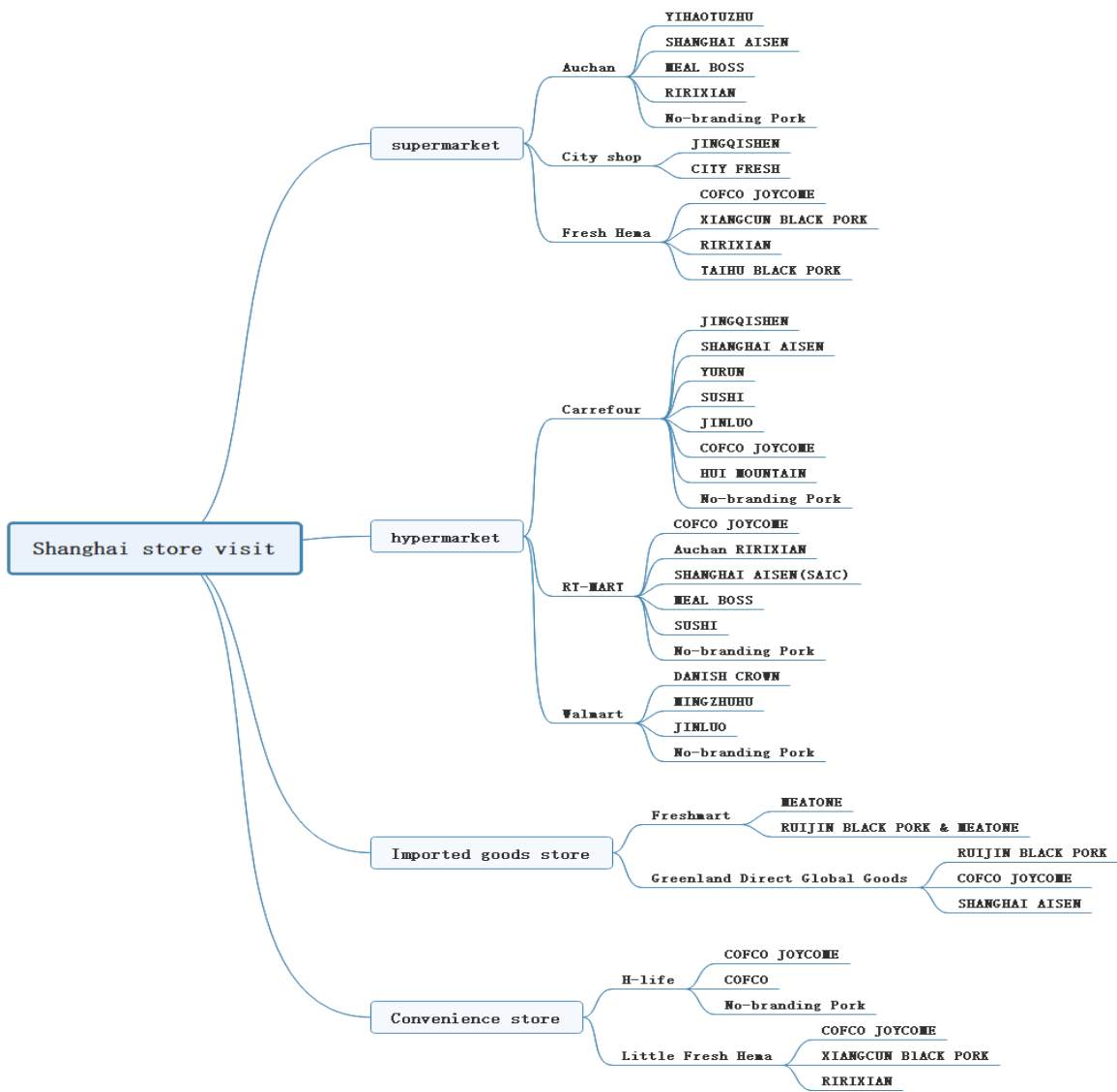


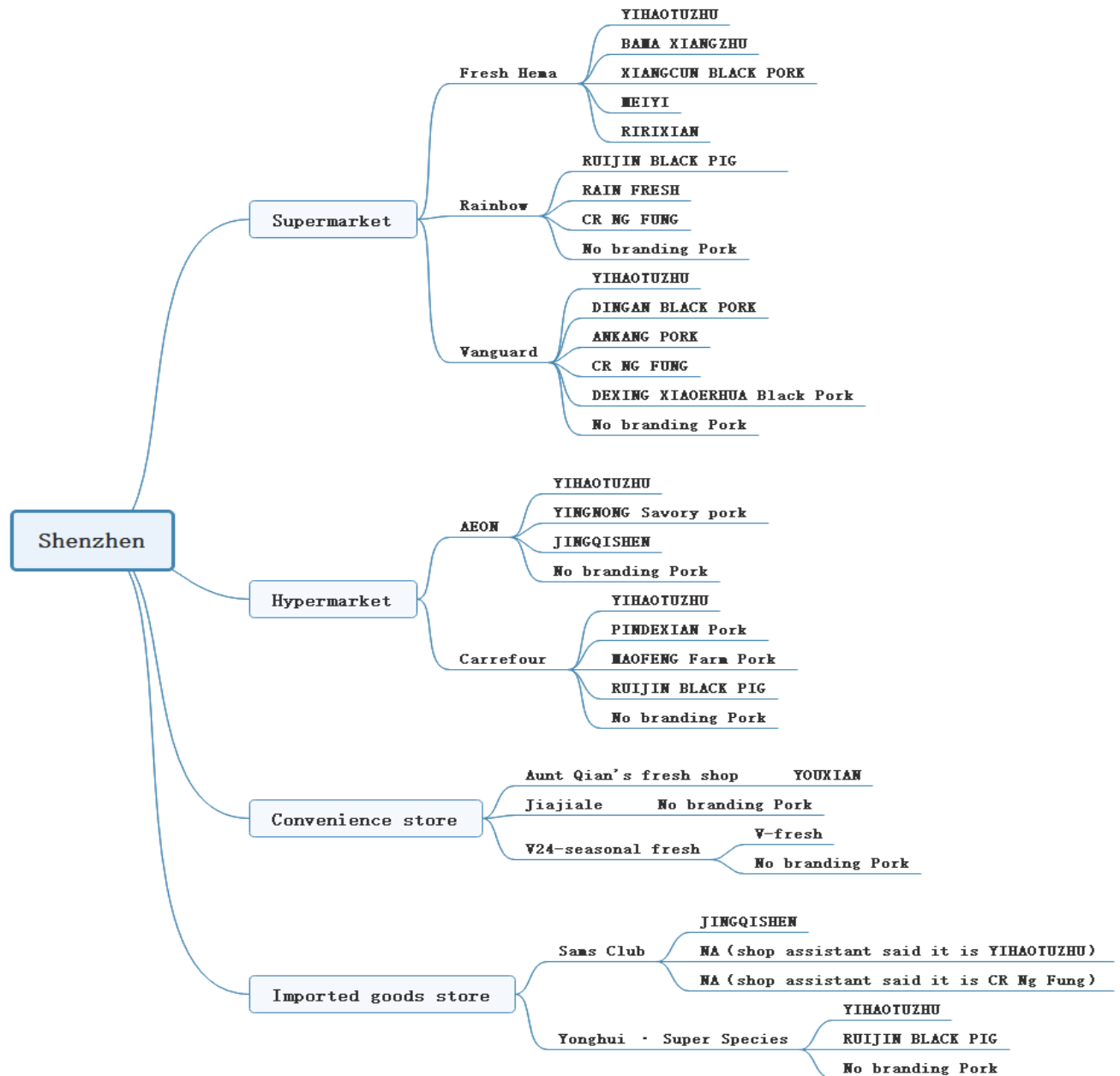
### 3.2. Results from visits in physical retail stores

For the retail channel, 30 physical retail stores were visited – 10 in each target city. A total of 38 pork brands were identified in the four different types of physical retail stores: supermarket, hypermarket, imported goods store and convenience store. Out of the 38 brands identified, only two brands were imported: U.S. pork from the USA (found in the imported goods store Olé in Guangzhou) and Danish Crown pork from Denmark (Walmart in Shanghai). Seven of the 11 main pork brands identified above were represented: Jingqishen, Yihaotuzhu, Meal Boss, Cofco Joycome, Yurun, Sushi and Jinluo. The 29 brands not characterized as main brands were either more local brands, smaller brands or private label brands of the retail stores. Figure 1 provides an overview over the type of stores visited in each city, the name of stores and the pork brands they carry.

**Figure 1: Overview over pork brands in 30 physical retail stores in Guangzhou, Shanghai and Shenzhen**








In the supermarkets, the most used branding activities were banners with brand name and pictures, posters, in-store TV showing videos of the pigs' living conditions, price promotion (discount, member prices) and a brand sales person promoting the brand face-to-face with consumers. In the majority of the supermarkets, there was a sales person/butcher in charge of selling pork from a particular brand. In most supermarkets, for instance Fresh Hema and Auchan, they offered cutting a larger piece of pork into the cuts desired by the consumer, and they were available for questions and requests and were a potential information source for consumers.

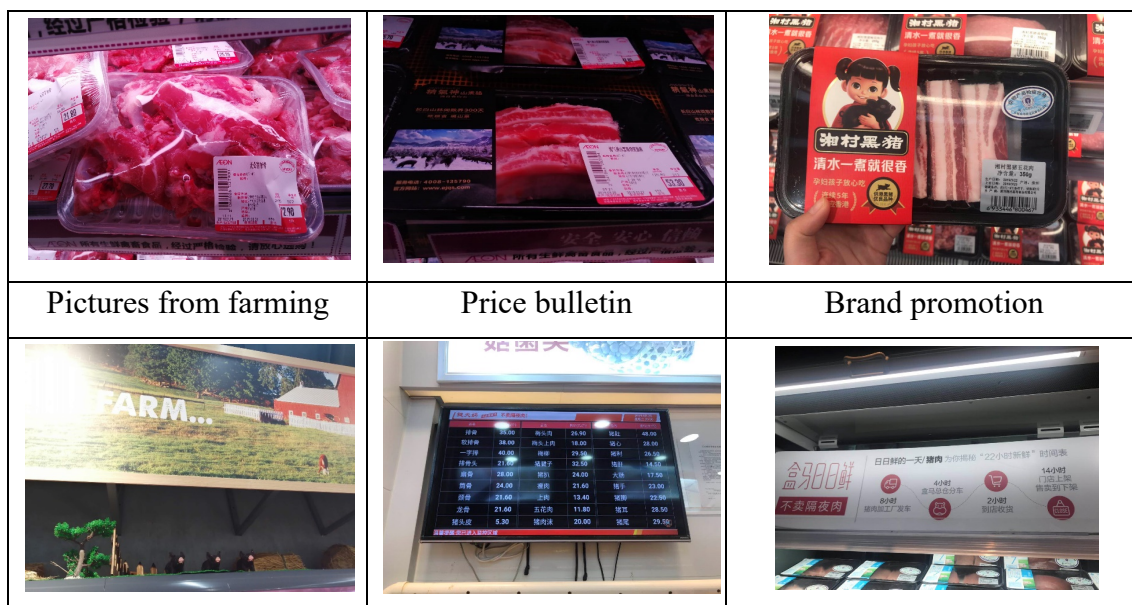
In the hypermarkets, banners, posters and in-store TV were also used, in addition to having an extra stall for a sales person from the brand (Vanguard in Shenzhen) and special events with special discounts during the weekends (Sam's Club in Shenzhen). This was to create extra awareness among consumers, but also to offer more interaction with the pork brands. However, most hypermarkets also had a daily sales person/butcher selling pork. Some hypermarkets also displayed certificates of some pork brands. The certificates could state that the brands' products had been awarded a prize (for instance for best tasting pork) or had obtained a certificate due to good animal welfare.

In the convenience stores, displays showing discounts, banners, posters and a brand sales person were also used along with "tags" recommending the product (Little Hema in Shanghai). Some convenience stores, such as Aunt Qian's Fresh Shop in Shenzhen and Guangzhou, had a display instore showing how the prices for different pork cuts were reduced after 7 pm. Every half hour the price decreased (for instance by 10% at 7 pm, 20% at 7.30 pm and 30% at 8 pm etc.). This dynamic pricing was applied to live up to the store's promise of selling only fresh products/no overnight products.

For the imported goods stores, banners, posters, in-store TV and discounts were used and Freshmart in Shanghai also had an official WeChat account providing after-sales service such as tips on storage and preparation and recipes. Figure 2 displays examples of branding activities.

**Figure 2: Examples of branding activities in physical retail stores**

Price promotion	In-store TV	Recipes
		
Counter promotion	Certificate	Banner
		
Non-branded	Branded package	Branded package



In general, the supermarkets and hypermarkets carried most of the 11 main pork brands (2 to 8), while the convenience stores and imported goods stores carried fewer pork brands. However, no matter the type of physical retailer, they were using more or less the same types of branding activities, banners, posters and discounts being the most basic promotion means, creating consumer awareness in-store. The hypermarkets and higher-end supermarkets also had a brand sales person and created events for special occasions offering the consumers more contact with the brand. In general, the larger the store (supermarkets, hypermarkets), the more promotion means were used, which probably reflects proportionally the number of consumers visiting the stores.






The branding activities displayed different claims made about the brands. Especially food safety, taste and quality were promoted in most of the branding activities. For instance, the instore videos made claims about the pork quality and attributed it to feeding, general living conditions for the pigs (space, possibility for conducting normal pig behaviour), but also the slaughtering process, where it was explained that trying to reduce stress among the pigs had a positive impact on the taste of the meat. The premium brand, Jingqishen, even claimed that playing music for the pigs had a positive impact on the meat quality. The videos were very detailed with pictures of the pigs running around outside enjoying both snow and sun and beautiful scenery and the process of feeding them. However, there were no detailed pictures of the slaughtering process, but there were pictures of how the cuts were wrapped in a clean and safe environment and transported to the retailers underlining the importance of food safety and quality throughout the value chain. Claims were also being made about the breed

of the pig. Especially the premium brands carrying black pig, such as Jingqishen and Meal Boss, explained in the videos (but also in banners) the special quality of black pork. Meal Boss explained how the company owns “the excellent genes of the Taihu pig”, and they even claimed that the nutritional value of the Taihu pork is higher than that of ordinary white pigs. The packaging of many of the black pork products signalled that they were positioned as premium: The labels displayed beautiful mountain scenery, happy black pigs and claims about the superior quality, and some black pork products were even wrapped so they could be presented as gifts.

### 3.3. Results from online stores

In the online sales channel, five stores were analysed. Four of them could be accessed online and in an app to download, while the Miss Fresh store was accessible through their app, which could be downloaded from their homepage. Table 4 provides an overview over the stores, how to access the online channel (website/app), how many pork brands they carry, the product types and promotion types.

**Table 4: Overview over online sales channels, how to access them, the number of pork brands, product types and promotion types**

Store	 JD Fresh	 Yiguo	 Suning Fresh	 YHD	 Miss Fresh
Usage	Website, app	Website, app	Website, app	Website, app	App
Numbers of pork brands	9	2	3	8	3
Pork product types	Fresh chilled, frozen, prepacked	Frozen, prepacked	Frozen, prepacked	Fresh chilled, frozen, prepacked	Fresh chilled, frozen, prepacked
Promotion	Banners, videos, product features, technology, recipes, defrost advice, certification, brand story	Product features, nutrition information, production flow, packaging, suggestions, eating tips, brand story	Banners, videos, product features, recipes, certification, brand story	Banners, videos, product features, technology, recipes, certification, brand story	Consumer recommendation, product features

A total of 21 different pork brands were identified in these five online stores. JD Fresh carried most brands with 9, followed by YHD with 8. The others had 2-3 pork brands. Six of the main pork brands identified earlier, Jingqishen (premium), Shuanghui, Joycome, NetEase Weiyang (premium), Jinluo

and Yihaotuzhu, were represented in the five online stores at the time of data collection. The 15 pork brands not characterized as a main pork brand were local brands and imported brands such as Danish Crown from Denmark, HyLife from Canada, Joy Chef black pork from Spain, Shany Oumei from Germany and JDME from both Brazil and The Netherlands. The relatively big share of imported brands may be due to the fact that all five online stores sell frozen and prepacked pork, and therefore have a cold chain that can handle frozen and prepacked products, which makes room for imported pork. JD, YHD and Miss Fresh also sell fresh chilled pork. The brands had from 2 to 25 different cuts in the online stores with the Chinese brands offering the biggest variety in cuts.

In terms of promotion of the pork products, all online stores displayed different branding activities. In all five stores, it was possible to find information about the brands: When the company was founded, where it originates from, the slogan, labels and claims, the slaughtering process and packaging technology. For instance, at JD Fresh, the Jingqishen brand was promoted as a high-quality brand, where the pig lives 300-days free-range in the Changbai mountains, while the Jinluo brand stated that it was a supplier to the Chinese female volleyball team. The claims were mainly centred around quality, safety, health and taste and as the information and claims were the same for a brand across the five stores, this information was most likely provided by the brand. This information was visualized by pictures (for instance of black pigs in a mountain area) and videos. The videos were similar to the promotion videos found in physical retail stores, but some, for instance Jingqishen at JD Fresh, were lengthier and more detailed regarding the feeding and surroundings of the pigs, the slaughtering process and the packaging and transport to the consumer again underlining the positioning of Jingqishen as a premium brand. Some brands also displayed their certificates (for instance organic or animal welfare certification) in the online stores, and promoted the brand story. For instance, for the Shany Oumei brand from Germany, there was information about that the law in Germany requires the farm director to spend at least 20 seconds with each pig every day, which means that the pigs grow up as happy pigs. This was supported by pictures of pigs enjoying their life in Germany.

In all online stores, except Miss Fresh, it was possible to get tips on how to defrost the meat correctly (to ensure good taste and quality). All five stores displayed recipes – however, not for all cuts. Some brands also displayed nutrition information – again, not for all cuts. The online stores also highlighted if there was a discount or a time limited offer on the pork meat.

One type of promotion that was clearly distinct from traditional retail stores was the review-section. All five stores had a section, where consumers could give feedback on the product. This was a mix



of positive and negative reviews about the texture, taste, cuts, price etc. of the pork, the convenience of using the pork, recipes, the production and transport system. For instance, at JD Fresh, there were 42000 positive reviews about the Jingqishen pork ribs focusing on high quality, reliability and delicious taste. There were 80 negative reviews, which dealt with poor packaging and the meat not being fresh.

For a mainstream brand like Delisi, there were 65000 positive reviews about the pork ribs and 100 negative. For an imported brand like Danish Crown, there were 69000 positive reviews about the pork ribs stating that they were delicious and fresh. 300 negative reviews focused on the pork not being fresh. YHD and JD Fresh had the most reviews in general (> 1000, even for the smaller brands), especially for the brands identified as the main pork brands. Even though YHD and JD Fresh are not owned by the same company, these two stores have a very similar design. The other online stores had often only below 1000 reviews – also for some of the main brands. This probably has to do with the ease of giving reviews, what customers have been accustomed to and whether customer has been encouraged to do so, when buying pork.

Of the 11 main brands, only two of them, namely the premium brand Jingqishen and the mainstream brand Shuanghui, were sold in three of the online channels: JD Fresh, Suning and YHD (none of the brands were sold in more than three online channels). This makes it possible to compare, whether the products are promoted in a similar manner across online stores. Figure 3 provides an overview over how the Jingqishen brand is presented.

**Figure 3: Presentation of the Jingqishen brand at JD Fresh, YHD and Suning Fresh**





All three stores provided pictures of the raw and the cooked product, and they used the same pictures (presumably provided by the company) to inform about the slaughtering and packaging technology. Both JD Fresh and YHD provided recipes, defrost advice, certification and more information about the brand's story, while Suning fresh focused more on the brand's unique selling points (five keywords) and information about the origin of the product. In all three online stores, Jingqishen was positioned as a premium brand. For a comparison with the mainstream Shuanghui brand, Figure 4 shows how this brand was presented.

**Figure 4: Presentation of the Shuanghui brand at JD Fresh, YHD and Suning Fresh**



JD Fresh and YHD introduce the brand, slogan and show elements of the brand's story, while Suning Fresh provides more information about the selling points of the brand: The strict quality control, the rigorous production process and the professional fresh distribution and the delivery commitment to ensure fresh products. All three stores provide information about the cuts of the pig and show both the raw product and a cooked version and link to recipes.

It is clear from this comparison that Suning Fresh has its own way of promoting the brands, while the styles of YHD and JD Fresh are more similar – even though they are not owned by the same company. Both JD Fresh and Suning Fresh are owned by Tencent, and the different styles maybe due to a wish of appealing to different consumer segments.

### 3.4. Results from food service

Out of the 16 food service providers visited, only three had branded pork on the menu: Shanghai Dim Sum, Jiu Mao Jiu and Ajisen Ramen. Shanghai Dim Sum is a local restaurant located in Shanghai, while Jiu Mao Jiu is a national restaurant chain (visited in Guangzhou). Ajisen Ramen is a national fast food chain (visited in Shenzhen). None of the three restaurants had any of the main pork brands on the menu. The local restaurant, Shanghai Dim Sum, which is a higher-end restaurant, had local Jinhua pork from Shanghai on the menu card (see Figure 5). There were 15 dishes mentioning Jinhua pork as an ingredient. The menu card also displayed information about the two-end black pig breed and showed a picture of the pig. When prompted, the staff was also able to inform about the pork brand, the origin and the breed.

**Figure 5: Examples of branded local pork from Shanghai Dim Sum (local restaurant)**



The second restaurant with branded pork was Jiu Mao Jiu, who had branded Danish pork from Danish Crown on the menu card. There was a small menu card, where there was a crown symbolizing Danish crown. There was also a bigger menu (book) with a whole page displaying two dishes with Danish pork and picture of a Danish farm with trees, the Danish flag (big) and small Danish flags next to the dishes including the wording "100 % from Danish crown". There were two dishes with Danish pork: Noodles with spare-ribs and longevity noodles for birthdays, so the Danish pork was suggested to be used for special occasions.

When the staff was asked, they informed that they had some Danish pork on the menu and the rest of the pork was presumably from China, but they were not sure. Figure 6 provides an example of how the Danish pork was displayed on the menu card at Jiu Mao Jiu.

**Figure 6: Examples of branded Danish pork from Danish Crown at Jiu Mao Jiu (national restaurant chain)\***



\* The crown (marked in the red box) stated that it is 100 % Danish pork from Danish Crown.

Ajisen Ramen (a national fast food chain) was the third food service provider who had branded pork on the menu. Here, it was also Danish pork from Danish Crown. It was displayed with pictures of small pigs, their feed, a “traditional” Danish farm and fields. Several dishes also had explicitly written that the dish contained pork from Denmark. See Figure 7 for an example.

When asked, the staff did not know where the unbranded pork came from, and they did not know the breed of the pig.

**Figure 7: Examples of branded Danish pork from Ajisen Ramen (national fast food chain)**

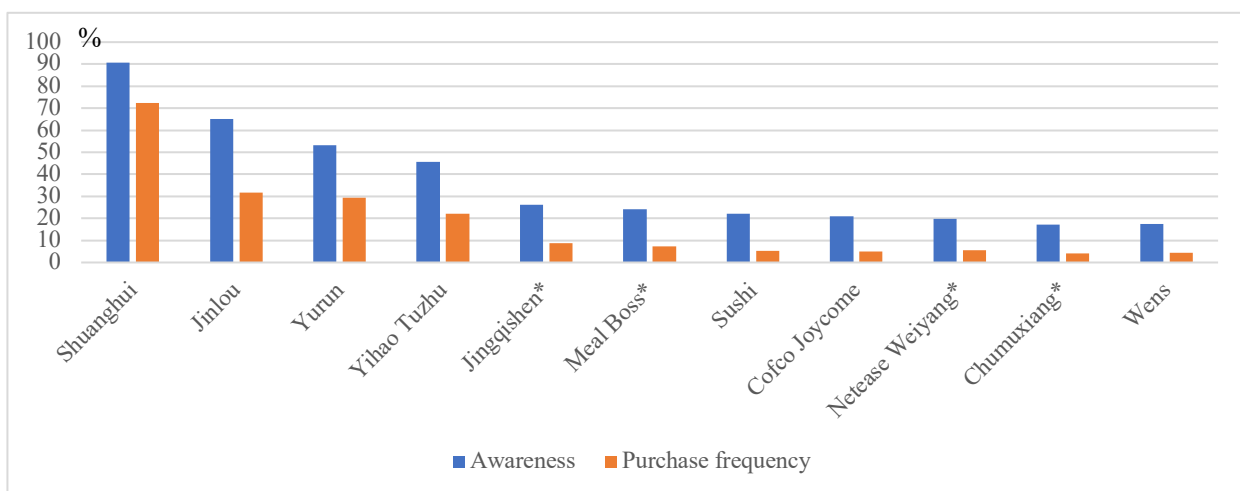


As only three out of 16 visited food service restaurants had branded pork on the menu, and all three displayed this information in the menu card, there was not much variation in terms of branding activities. The menu card seemed to be the most important place to promote the brands, and then the staff, if they were trained to know this information. The menu cards used the brand names, but also the breed at least for the local brand Jinhua at Shanghai Dim Sum. In the case of the Danish Crown brand at both Jiu Mao Jiu and Ajisen Ramen, brand associations were created through pictures and symbols such as the Danish flag and the crown (presumably referring to the producer name, Danish Crown, but may be also to provide associations to the royal Danish family). Pictures that illustrated Danish farming and the good conditions for pork production also indicated high quality pork meat.

### 3.5. Consumer perception of pork brands and use of sales channels

When consumers were asked to indicate which of the 11 main pork brands (name and logo), they had seen before, Shuanghui was the most recognized with 90.6% followed by Jinlou (65.2%), Yurun (53.2%) and Yihao Tuzhu (45.7%). All three brands are considered to be mainstream brands. When consumers were asked about which two brands they buy most often, Shuanghui was most often named by 72.3% of consumers followed by Jinlou (31.6%) and Yurun (29.4%). The four brands classified as premium brands, Jingqishen, Meal Boss, NetEase Weiyang and Chumuxiang were recognized by between 17.3 and 26.3% of consumers and bought by between 4.2 and 8.9%. Figure 8 provides an overview of awareness and purchase frequency of the 11 pork brands among the consumers in the sample.

**Figure 8: % awareness and % of being among the two most frequently bought brands**

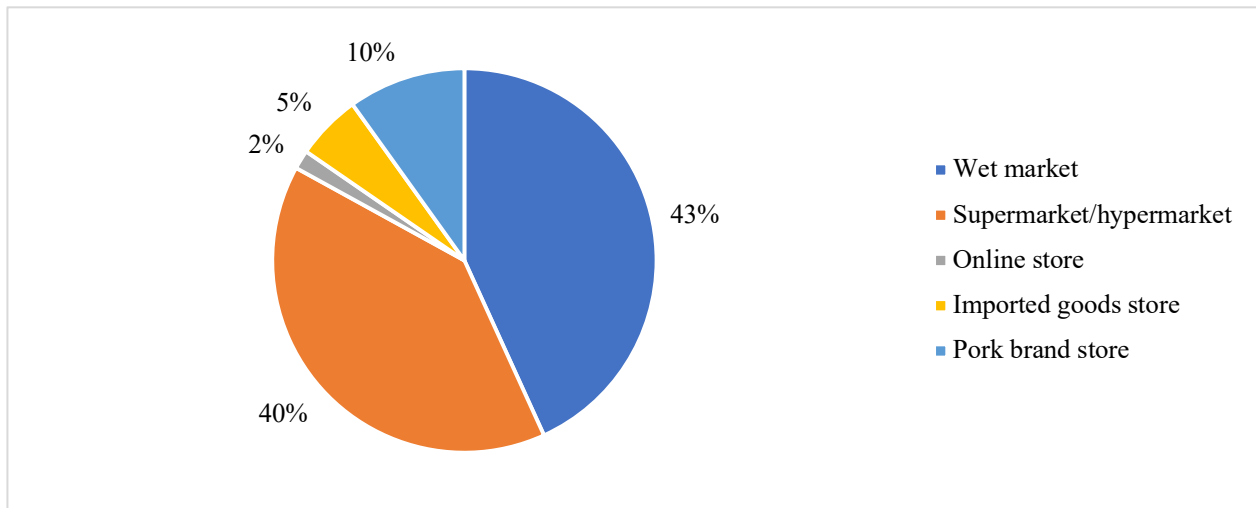


\* premium brand



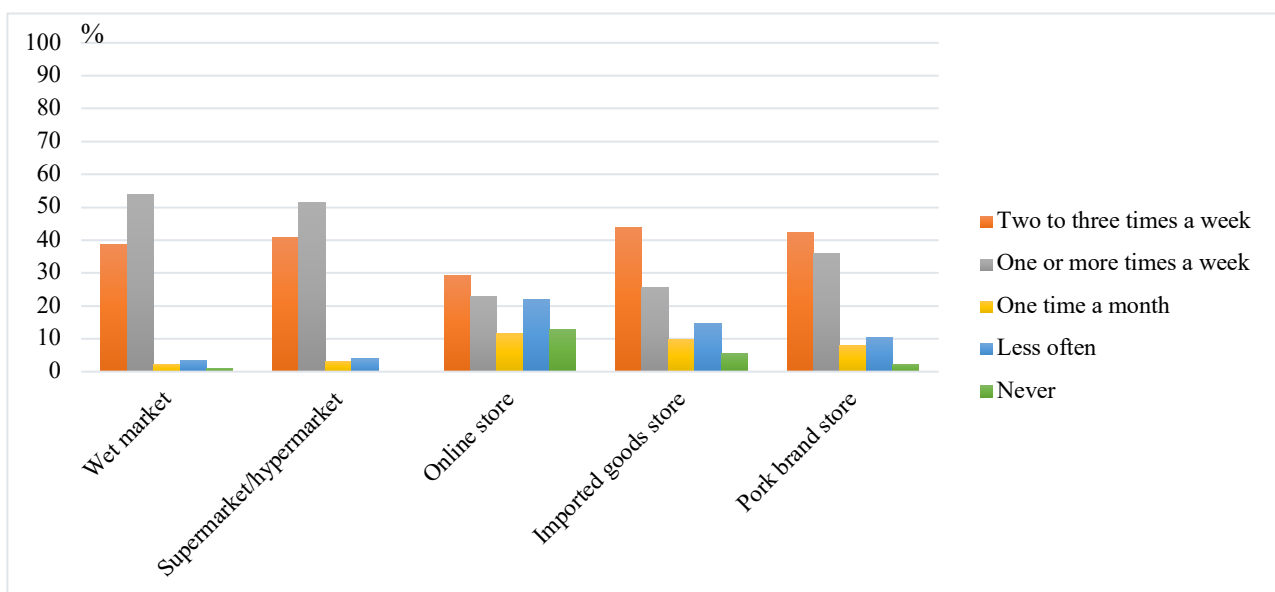
Respondents were asked about where they buy their pork meat, with wet markets, supermarket/hypermarket, online stores, imported goods stores and pork brand stores as the possible sales channels. Wet markets and supermarkets/hypermarkets clearly had the biggest shares with 43% and 40%, respectively, see Figure 9.

**Figure 9: Most often used sales channel for buying pork, %**



To understand how consumers spread their purchases over different sales channels, they were asked about the frequency of using the different sales channels for buying pork. As Figure 10 shows, many consumers use multiple channels in one week.

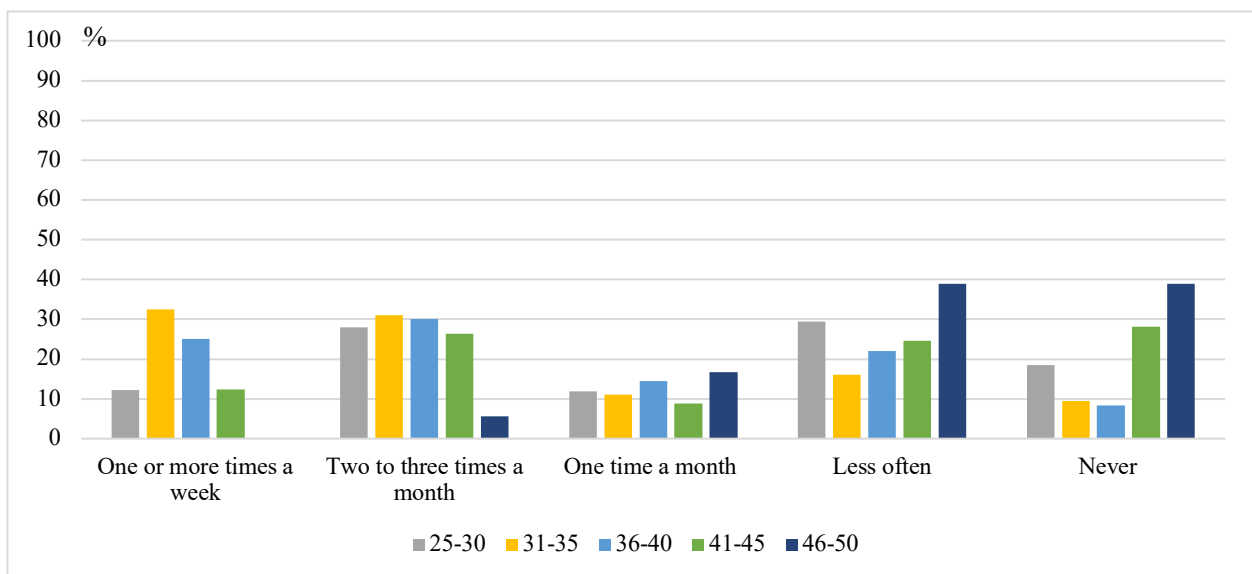
**Figure 10: Sales channel usage**



Between 29 and 44% of the consumers stated that they bought pork in wet markets, supermarkets/hypermarkets, online stores, imported goods stores and pork brand stores two to three times a week and over 50% stated that they bought it in wet markets and supermarkets/hypermarkets at least once a week. Hence, the Chinese consumers use multiple sales channels, when they buy pork.

A total of 13% never bought pork in an online store, while 23% bought one or more times per week and 29% bought two or three times per month. When looking into the different age groups using online stores, the use of websites and apps to order groceries from online stores was preferred among the 31 to 35-year-olds, where 32% used the online stores for buying pork one or more times per week, while this goes for 25% of the 36-40-year-olds, 12% of the 25-30 and 41-45-year-olds and for none of the consumers above 46 years of age. A total of 39% of the 46-50-year-olds never used online stores to buy pork (see Figure 11).

**Figure 11: Frequency of consumers buying pork in an online store per age group, %**



Consumers were also asked to evaluate the two brands that they buy most frequently (the same two brands chosen in Figure 8) on price and seven quality indicators: safety, taste, quality, healthiness, trust, meat consistency and animal welfare. Table 5 shows the means and the standard deviations for each parameter and also the number of consumers evaluating each brand. Here Shuanghui, which also scored highest on awareness, was evaluated by 1483 respondents, while Chumuxiang was only evaluated by 86 consumers.

**Table 5. Mean scores on eight quality indicators for 11 pork brands on a scale from 1 to 7\***

		Jingqishen#	Sushi	Netease Weiyang#	Yihao Tuzhu	Meal Boss#	Wens	Chumuxi ang#	Jinlou	Yurun	Cofco Joycome	Shuangh ui
<i>n</i>		<b>182</b>	<b>108</b>	<b>116</b>	<b>453</b>	<b>147</b>	<b>89</b>	<b>86</b>	<b>649</b>	<b>602</b>	<b>101</b>	<b>1483</b>
<b>Safety</b>	Mean	6.12	6.08	6.10	6.20	6.07	5.92	6.07	5.85	5.98	5.77	5.95
	SD	.80	.86	.93	.75	.93	.77	.93	.93	.89	.98	.94
<b>Taste</b>	Mean	6.15	5.62	5.76	6.15	5.82	5.65	5.71	5.69	5.73	5.71	5.90
	SD	.88	.90	.93	.80	1.00	1.04	.94	1.00	.98	1.05	.92
<b>Price</b>	Mean	5.53	5.70	5.42	5.17	5.35	5.15	5.53	5.53	5.43	5.51	5.48
	SD	1.44	1.01	1.42	1.77	1.39	1.47	1.27	1.21	1.20	1.20	1.26
<b>Quality</b>	Mean	6.06	5.80	5.79	6.06	5.82	5.69	5.69	5.75	5.79	5.65	5.78
	SD	.85	.84	.87	.89	.89	.91	1.04	.97	.96	1.10	1.03
<b>Healthiness</b>	Mean	6.02	5.73	5.75	6.11	5.84	5.76	5.76	5.70	5.79	5.60	5.73
	SD	.85	.82	.83	.89	.94	.95	1.11	1.02	.93	.98	1.08
<b>Trust</b>	Mean	6.09	5.92	5.92	6.09	5.82	5.71	5.86	5.84	5.84	5.72	5.90
	SD	.82	.93	.87	.86	.99	.97	.95	.96	.96	.99	1.00
<b>Meat consistency</b>	Mean	6.12	5.80	5.72	5.98	5.98	5.73	5.72	5.61	5.77	5.67	5.65
	SD	.83	.89	.93	.93	.94	1.02	1.00	1.11	.98	1.08	1.10
<b>Animal welfare</b>	Mean	5.96	5.94	5.79	5.89	5.92	5.46	5.78	5.57	5.65	5.52	5.54
	SD	.97	1.02	1.09	1.08	.98	1.07	1.10	1.11	1.15	1.13	1.19
<b>Overall mean</b>		6.01	5.83	5.78	5.96	5.83	5.63	5.77	5.69	5.75	5.64	5.74

\* Each consumer evaluated the eight quality indicators for the two brands they buy most frequently (the same brands as chosen in Figure 8).

# Premium brands

Table 5 shows that the means are quite similar among the 11 brands, which is most likely related to the fact that consumers rated the brands that they buy most frequently and of which they therefore can be expected to have a positive impression. The brand evaluated most favourably overall was the premium brand, Jingqishen, with an average of 6.01 (on a scale from 1 to 7) followed by Yihao Tuzhu with 5.96. The lowest overall evaluation was of Wens with 5.63. Hence, all brands were favourably evaluated by some consumers, although the number of consumers having these as favourite brands differed considerably.

### 3.6. Brands across sales channels

None of the 11 main brands were active in the three sales channels investigated (physical stores, online stores and food service). Since there was only one local Chinese pork brand and an imported pork brand from Denmark in the food service outlets carrying branded pork, it is only relevant here to compare the activities of the main brands in the physical retail and online sales channels.

Seven of out of the 11 main brands were only present in the physical retail stores: Two premium brands, Jingqishen and Meal Boss, and five mainstream brands, Yihaotuzhu, Cofco Joycome, Yurun, Sushi and Jinluo. In the physical retail stores, the mainstream brands seemed to do more price promotions and promotion in the counter than the premium brands, which might be due to the heavy competition among the mainstream brands – especially on price. The premium brands displayed more videos, certificates and information about the breed to underline their high-end positioning.

In the online sales channel, two out of the 11 main brands were found: the premium brand, Jingqishen, and the mainstream brand, Shuanghui. Figure 3 and 4 displayed how they were presented online. Where the premium brand displayed high-quality pictures, information about the breed, the surroundings and the production process underlining food safety, Shuanghui displayed many pictures of different cuts, recipes and information about the production.

Since Shuanghui was not found in any of the physical retail stores, but only online, it is only possible to compare the branding activities of the premium brand, Jingqishen, which was found both online and in physical retail stores (hypermarkets, supermarkets and imported goods stores).

Across the two sales channels, the Jingqishen brand was promoted as premium with high-quality products highlighting the black pork breed, how the pigs are fed with corn and grains to ensure good taste, and how they live a good life in the Changbai mountains. At the same time the slaughtering and packaging process was described in their branding materials (both online and in physical retail stores),



suggesting that food safety and trust is important for the brand as well. Both in retail and online, the brand used high-quality pictures – often with a black background to remind the consumers of the black pig breed, and the brand documents the quality of the meat by displaying (organic) certifications and helping the consumer to defrost and prepare the pork to ensure a good experience. The brand was both in the physical retail stores and online positioned as an exclusive brand, which consumers can use for presents to friends or family or for marking special occasions. Jingqishen was also highly recommended by consumers on the JD Fresh online store with the consumers highlighting especially the high quality and delicious taste of the meat as well as the reliability of the brand.

The exclusive positioning of the brand was also underlined by the price level, which was remarkably higher than other of the 11 main brands – both online and in physical retail stores in all three cities. However, there were also local brands with a similar high price level in some retail stores.

Thus, Jingqishen has managed to position itself as a premium high-end, reliable quality brand across the two sales channels, which is also confirmed by the overall evaluation of the brand in the consumer survey. Many of the branding activities are similar across the two sales channels (videos, recipes, tips, brand and nutrition information), and the brand claims and positioning are supported by the same visual materials making it easier for the consumer to recognize the brand across sales channels.

## 4. Conclusion

This report has mapped brands and branding activities for pork in three types of sales channels in China.

The results show the importance of branding on the Chinese market for pork, and also the diversity of the brands currently on the market. We identified 11 brands as main brands, but in addition to that we also found a high number of local and private label brands in the stores. Stores, both online and physical, typically handle several brands, indicating the extent to which brands compete with each other on the Chinese market.

Safety is the most important feature emphasized by brands, but in addition brands try to position themselves also with regard to health, taste and production process. Brands fall roughly into two categories: Mainstream brands (7) and premium brands (4). Premium brands are characterized by the use of the black pig and by a stronger emphasis on conditions with regard to the rearing of the pigs and processing of the pork. Premium brands are also notably more expensive than mainstream brands, although there is a strong price variation also within the premium segment. Among the mainstream brands, prices are much more similar.

Brands engage in a large number of branding activities. In the online channel, this includes information about the brands' products, claims and certifications, the production process, videos, tips, recipes and the possibility for consumers to read other consumers' review of the brand's products. In physical retail stores, many of the same branding activities took place (except for the customer reviews) – but mainly in the hyper- and supermarkets.

Most of the branding instruments used in the stores seem to be supplied by the brand owner, but especially online retailers also engage in own activities to promote certain brands.

Preliminary data suggest that a little less than half of the pork sales in the 1<sup>st</sup> tier cities are carried out on wet markets, indicating that for the rest consumers have the opportunity to buy branded pork. However, these data also indicate considerable variation in the popularity of these brands. Work package 2 in this project will shed more light on this. These data also indicate that many consumers use multiple channels, buying pork both from online and from physical retailers. Work package 2 will provide detail on the way in which use of sales channels is linked to the formation of brand images.

## Appendix 1 Data collection sheets

### A. Registration sheet for store visits (retail)

(please fill in in English, if not available, for instance no slogan, please write NA, so we know you checked)

<b>Date</b> (of store visit)					
<b>Name of visiting researcher</b>					
<b>Type of store</b> (see definitions above)	<input type="checkbox"/> Supermarket	<input type="checkbox"/> Hyper market	<input type="checkbox"/> Convenience store	<input type="checkbox"/> Imported goods store	<input type="checkbox"/> Brand store
<b>Name of store/chain</b>					
<b>Location of store</b> (Guangzhou, Shenzhen or Shanghai)					
<b>Number of different pork brands in store</b>					

<b>Brand</b> (should be filled out for each brand in store)	1	2	3	4	5	6
<b>Brand name</b> (English)						
<b>Brand name</b> (Chinese)						
<b>Brand origin</b> (country/region)						
<b>Pork product types</b> (fresh warm, fresh chilled, prepacked, frozen)						
<b>Number of cuts</b> (maximum number of cuts in store)						
<b>Product packaging</b> (description of type* (AMP,						

<i>wrap pack, vacuum pack, no pack/open counter)</i>						
<b>Logo</b> (please insert logo or refer to the brand number in Table 1)						
<b>Slogan</b> (in English)						
<b>Labelling</b> (certified organic, not certified organic, animal welfare etc.)						
<b>Pictures on product packaging</b> (describe: Pigs, grass, happy girl etc.)						
<b>Price</b> (price in RMB per 500 g)						
• <b>Ribs</b>						
• <b>Streaky pork</b>						
• <b>Lean</b>						
<b>Promotion</b> (description of instore advertisement (banners, TV, displays etc.) and activities (tasting, recipes etc.)						
<b>Place</b> (position of counter in store: front, mid, back of store)						
<b>Shelf space</b> (number of a brand's packages on one shelf)						
<b>Branding types</b> (producer branding, origin branding, co-branding, local branding or private label)						
<b>Pictures taken</b> (yes/no and name of pictures)						
<b>General impressions</b> Other relevant information about the brand						

\*AMP: Atmosphere packed by producer, sealed, wrap: Wrapped in store with film, not sealed, Vacuum packed: No air, often frozen, no pack: Open counter, no wrapping

## B. Registration sheet for online stores

(please fill in in English. If not available, for instance no slogan, please write NA, so we know you checked)

<b>Date</b> <i>(of online visit)</i>	
<b>Name of store/chain</b>	
<b>Webpage URL</b>	
<b>Number of different pork brands in store</b>	

<b>Brand</b> <i>(should be filled out for each brand in store)</i>	1	2	3	4	5	6
<b>Brand name</b> <i>(English)</i>						
<b>Brand name</b> <i>(Chinese)</i>						
<b>Brand origin</b> <i>(country/region)</i>						
<b>Pork product types</b> <i>(fresh warm, fresh chilled, prepacked, frozen)</i>						
<b>Number of cuts</b> <i>(maximum number of cuts in store)</i>						
<b>Product packaging</b> <i>(description of type* (AMP, wrap pack, vacuum pack, no pack/open counter)</i>						
<b>Logo</b> <i>(please insert logo)</i>						
<b>Slogan</b> <i>(in English)</i>						
<b>Labelling</b> <i>(certified organic, not certified organic, animal welfare etc.)</i>						
<b>Pictures on product packaging</b> <i>(describe: Pigs, grass, happy girl etc.)</i>						
<b>Price</b>						

<i>(price in RMB per 500 g)</i>						
• <b>Ribs</b>						
• <b>Strips</b>						
• <b>Lean pork</b>						
<b>Promotion</b> <i>(description of advertisement online: banners, special placement, link to social media, videos, recipes etc.)</i>						
<b>Place</b> <i>(position in online store: as frontpage, subpage etc.)</i>						
<b>Branding types</b> <i>(producer branding, origin branding, co-branding, local branding or private label)</i>						
<b>Screen shots taken</b> <i>(yes/no and name of files)</i>						
<b>Brand information</b>						
<b>Number of good comments on website</b> <i>(number and keywords)</i>						
<b>Number of bad comments on website</b> <i>(number and keywords)</i>						
<b>General impressions</b> <i>Other relevant information about the brand</i>						

### C. Registration sheet for foodservice providers

(please fill in in English, if not applicable, please write NA, so we know you have checked it)

<b>Date of visit</b>		
<b>Name of researcher visiting</b>		
<b>Type of store</b>	<input type="checkbox"/> Full-service restaurants <input type="checkbox"/> Fast food	
<b>Brand type of restaurant/fast food</b>	<input type="checkbox"/> National brand	<input type="checkbox"/> Local brand
<b>Name of restaurant/chain</b>		
<b>City</b> (Guangzhou, Shenzhen, Shanghai)		
<b>Webpage URL</b> (if desk research)		

<b>Where is the pork from?</b> <i>(even if not branded, please ask staff for information about countries/regions)</i>	
<b>What breed is the pork?</b> <i>(white pork, black pork etc.)</i>	
<b>What type of cut do they have?</b> <i>(rips, strips, lean pork, belly etc.)</i>	
<b>Is the pork branded?</b> <i>(yes/no – if more than one brand, please fill in for each brand)</i>	
<b>If yes, where is the pork branded?</b> <i>(on menu cards, website, displays etc.)</i>	
<b>Is there a brand name?</b> <i>(yes/no, which name?)</i>	

<b>Is there a country/region of origin?</b> <i>(yes/no, which origin?)</i>	
<b>Is there a logo?</b> <i>(yes/no, please insert)</i>	
<b>What dishes have branded pork?</b> <i>(none or name of dish)</i>	
<b>Pictures taken</b> <i>(of branding yes/no and name of pictures)</i>	
<b>General impressions</b>	



## Appendix 2. Consumer survey

### Online questionnaire on purchase of pork

First, we would like to thank you for participating in this Survey. This research project is conducted by Sun Yat-Sen University and Aarhus University in Denmark. In this Survey, we would like to ask you a series of questions about purchasing pork. Thank you for your cooperation!

Food consumption research group of Sun Yat-Sen University and Aarhus University

#### Q1. Are you responsible for shopping for food in your household?

Yes	No
-----	----

#### Q2. Are you responsible for cooking and preparing food at your household?

Fully responsible	
Partly responsible	
Not responsible	

#### Q3. Who helps you with cooking and preparing food (check all that apply):

Children  
Spouse/partner  
Parents  
Maid/House cleaner  
I do not have any help

#### Q4. On average, how often do you eat pork at home?

4-7 times a week  
1-3 times a week  
Once every second week  
About once a month  
About once every other month  
Less often  
Never

#### Q5. On average, how often do you eat pork when you go out to eat? (e.g. restaurants).

4-7 times a week  
1-3 times a week  
Once every second week  
About once a month  
About once every other month  
Less often  
Never

**Q6. Have you bought pork at least once during the last month?**

Yes	No
-----	----

**Q7. How often do you buy pork at an open market?**

- One or more times a week
- Two to three times a month
- One time a month
- Less often
- Never

**Q8. How often do you buy pork in the supermarket?**

- One or more times a week
- Two to three times a month
- One time a month
- Less often
- Never

**Q9. How often do you buy pork online?**

- One or more times a week
- Two to three times a month
- One time a month
- Less often
- Never

**Q10. How often do you buy pork in imported goods stores?**

- One or more times a week
- Two to three times a month
- One time a month
- Less often
- Never

**Q11. How often do you buy pork in pork brand stores?**

- One or more times a week
- Two to three times a month
- One time a month
- Less often
- Never

**Q12. In which of the following do you buy pork most often? (select one answer)**

- Open market
- Supermarket
- Online
- Imported goods store
- Pork brand store

**Awareness of Chinese brands (recognition)**

**Q13. Please mark which of the following types of pork brands have you seen before:**

Shuanghui		
Yurun		
Jinlou		
Chumuxiang		
Wens		
JINGQISHEN		
Meal Boss		
Sushi		
NetEase Weiyang		
COFCO JOYCOME		
<u>Yihao Tuzhu</u>		

**Q14. Which two of the following brands do you buy most often? (Select two):** *The two chosen brands will be used for questions concerning quality (Q40)*

Shuanghui	
Yurun	
Jinlou	
Chumuxiang	

Wens	
JINGQISHEN	
Meal Boss	
Sushi	
NetEase Weiyang	
COFCO JOYCOME	
<u>Yihao Tuzhu</u>	

### Q15. Awareness of imported pork

Items	Yes	No
Q15. Have you seen imported pork from Europe in a supermarket before?		
Q16. Have you seen European pork being used/advertised in a restaurant before?		
Q17. Have you ever seen European pork in an imported goods store before?		
Q18. Have you ever seen European pork in an online shop before?		
Q19. Have you seen imported pork from Denmark in a supermarket before?		
Q20. Have you seen/noticed Danish pork being used/advertised in a restaurant before?		
Q21. Have you ever seen Danish pork in an imported goods store before?		
Q22. Have you ever seen Danish pork in an online shop before?		
Q23. Have you seen imported pork from the US in a supermarket before?		
Q24. Have you seen/noticed American pork being sold/advertised in a restaurant before?		
Q25. Have you ever seen American pork in an imported food store before?		
Q26. Have you ever seen American pork in an online shop before?		

*If yes on the questions above, continue to Q27/if no skip to Q40 (quality)*

### Q16. Have you ever seen this European pork brand before?

EU pork logo	Yes	No
--------------	-----	----

Purchase of EU or Danish pork  
European pork

**Q17. Have you bought European pork before?** (if no, turn to Q31)

Yes	No
-----	----

**Q18. If yes, how many times have you bought European pork during the last year?**

1-3 times	4-6 times	7-9 times	10-12 times	13-15 times	16-17 times	18 or more
-----------	-----------	-----------	-------------	-------------	-------------	------------

**Q19. If you have bought European pork before: How satisfied are you with the European pork that you bought?**

Not at all						Very much
1	2	3	4	5	6	7

### **Danish pork**

**Q20. Have you bought Danish pork before?** (if no, turn to Q34)

Yes	No
-----	----

**Q21. If yes, how many times have you bought Danish pork during the last year?**

1-3 times	4-6 times	7-9 times	10-12 times	13-15 times	16-17 times	18 or more
-----------	-----------	-----------	-------------	-------------	-------------	------------

**Q22. If you have bought Danish pork before: How satisfied are you with the Danish pork that you bought?**

Not at all						Very much
1	2	3	4	5	6	7

### **Eating EU or Danish pork in Food service**

#### **European pork**

**Q23. Have you knowingly eaten European pork in a restaurant before?** (e.g. restaurants or the like; if no, turn to Q26)

Yes	No
-----	----

**Q24. If yes, how many times have you knowingly eaten European pork in a restaurant during the last year?**

1-3 times	4-6 times	7-9 times	10-12 times	13-15 times	16-17 times	18 or more
-----------	-----------	-----------	-------------	-------------	-------------	------------

**Q25. If you have knowingly eaten European pork before in a restaurant: How satisfied are you with European pork that you have eaten in the restaurant?**

Not at all						Very much
1	2	3	4	5	6	7

### **Danish pork**

**Q26. Have you knowingly eaten Danish pork in a restaurant before?** (e.g. restaurants or the like; if no, turn to Q29)

Yes	No
-----	----

**Q27. If yes, how many times have you knowingly eaten Danish pork in a restaurant last year?**

1-3 times	4-6 times	7-9 times	10-12 times	13-15 times	16-17 times	18 or more
-----------	-----------	-----------	-------------	-------------	-------------	------------

**Q28. If you have knowingly eaten Danish pork before in a restaurant: How satisfied are you with Danish pork that you have eaten in the restaurant?**

Not at all						Very much
1	2	3	4	5	6	7

### Quality perception

**Q29. In the following please rate the quality of some of the pork brands that you have seen before. Depends on answers from Q13 and Q14 (only pork brands the respondents have seen before)**

Pork	Items	Choices								
Shuanghui	A1. Safety	Not safe	1	2	3	4	5	6	7	Safe
	A2. Taste	Bad taste	1	2	3	4	5	6	7	Good taste
	A3. Price	Expensive	1	2	3	4	5	6	7	Cheap
	A4. Quality	Bad quality	1	2	3	4	5	6	7	Good quality
	A5. Healthy	Not Healthy	1	2	3	4	5	6	7	Healthy
	A6. Trust	Not trustworthy	1	2	3	4	5	6	7	Trustworthy
	A7. Consistency	Tough	1	2	3	4	5	6		Tender
	A8. Animal welfare	Low welfare	1	2	3	4	5	6	7	High welfare
Imported from US	A1. Safety	Not safe	1	2	3	4	5	6	7	Safe
	A2. Taste	Bad taste	1	2	3	4	5	6	7	Good taste
	A3. Price	Expensive	1	2	3	4	5	6	7	Cheap
	A4. Quality	Bad quality	1	2	3	4	5	6	7	Good quality
	A5. Healthy	Not Healthy	1	2	3	4	5	6	7	Healthy
	A6. Trust	Not trustworthy	1	2	3	4	5	6	7	Trustworthy
	A7. Consistency	Tough	1	2	3	4	5	6		Tender
	A8. Animal welfare	Low welfare	1	2	3	4	5	6	7	High welfare
Imported from Europe	A1. Safety	Not safe	1	2	3	4	5	6	7	Safe
	A2. Taste	Bad taste	1	2	3	4	5	6	7	Good taste
	A3. Price	Expensive	1	2	3	4	5	6	7	Cheap
	A4. Quality	Bad quality	1	2	3	4	5	6	7	Good quality
	A5. Healthy	Not Healthy	1	2	3	4	5	6	7	Healthy
	A6. Trust	Not trustworthy	1	2	3	4	5	6	7	Trustworthy
	A7. Consistency	Tough	1	2	3	4	5	6		Tender
	A8. Animal welfare	Low welfare	1	2	3	4	5	6	7	High welfare
Cofco Joycome	A1. Safety	Not safe	1	2	3	4	5	6	7	Safe
	A2. Taste	Bad taste	1	2	3	4	5	6	7	Good taste
	A3. Price	Expensive	1	2	3	4	5	6	7	Cheap
	A4. Quality	Bad quality	1	2	3	4	5	6	7	Good quality
	A5. Healthy	Not Healthy	1	2	3	4	5	6	7	Healthy
	A6. Trust	Not trustworthy	1	2	3	4	5	6	7	Trustworthy
	A7. Consistency	Tough	1	2	3	4	5	6		Tender
	A8. Animal welfare	Low welfare	1	2	3	4	5	6	7	High welfare
Yurun	A1. Safety	Not safe	1	2	3	4	5	6	7	Safe
	A2. Taste	Bad taste	1	2	3	4	5	6	7	Good taste
	A3. Price	Expensive	1	2	3	4	5	6	7	Cheap
	A4. Quality	Bad quality	1	2	3	4	5	6	7	Good quality
	A5. Healthy	Not Healthy	1	2	3	4	5	6	7	Healthy
	A6. Trust	Not trustworthy	1	2	3	4	5	6	7	Trustworthy
	A7. Consistency	Tough	1	2	3	4	5	6		Tender

	A8. Animal welfare	Low welfare	1	2	3	4	5	6	7	High welfare
Jinlou	A1. Safety	Not safe	1	2	3	4	5	6	7	Safe
	A2. Taste	Bad taste	1	2	3	4	5	6	7	Good taste
	A3. Price	Expensive	1	2	3	4	5	6	7	Cheap
	A4. Quality	Bad quality	1	2	3	4	5	6	7	Good quality
	A5. Healthy	Not Healthy	1	2	3	4	5	6	7	Healthy
	A6. Trust	Not trustworthy	1	2	3	4	5	6	7	Trustworthy
	A7. Consistency	Tough	1	2	3	4	5	6		Tender
	A8. Animal welfare	Low welfare	1	2	3	4	5	6	7	High welfare
Fresh pork meat	A1. Safety	Not safe	1	2	3	4	5	6	7	Safe
	A2. Taste	Bad taste	1	2	3	4	5	6	7	Good taste
	A3. Price	Expensive	1	2	3	4	5	6	7	Cheap
	A4. Quality	Bad quality	1	2	3	4	5	6	7	Good quality
	A5. Healthy	Not Healthy	1	2	3	4	5	6	7	Healthy
	A6. Trust	Not trustworthy	1	2	3	4	5	6	7	Trustworthy
	A7. Consistency	Tough	1	2	3	4	5	6		Tender
	A8. Animal welfare	Low welfare	1	2	3	4	5	6	7	High welfare
Chumuxiang	A1. Safety	Not safe	1	2	3	4	5	6	7	Safe
	A2. Taste	Bad taste	1	2	3	4	5	6	7	Good taste
	A3. Price	Expensive	1	2	3	4	5	6	7	Cheap
	A4. Quality	Bad quality	1	2	3	4	5	6	7	Good quality
	A5. Healthy	Not Healthy	1	2	3	4	5	6	7	Healthy
	A6. Trust	Not trustworthy	1	2	3	4	5	6	7	Trustworthy
	A7. Consistency	Tough	1	2	3	4	5	6		Tender
	A8. Animal welfare	Low welfare	1	2	3	4	5	6	7	High welfare
Wens	A1. Safety	Not safe	1	2	3	4	5	6	7	Safe
	A2. Taste	Bad taste	1	2	3	4	5	6	7	Good taste
	A3. Price	Expensive	1	2	3	4	5	6	7	Cheap
	A4. Quality	Bad quality	1	2	3	4	5	6	7	Good quality
	A5. Healthy	Not Healthy	1	2	3	4	5	6	7	Healthy
	A6. Trust	Not trustworthy	1	2	3	4	5	6	7	Trustworthy
	A7. Consistency	Tough	1	2	3	4	5	6		Tender
	A8. Animal welfare	Low welfare	1	2	3	4	5	6	7	High welfare
Meal Boss	A1. Safety	Not safe	1	2	3	4	5	6	7	Safe
	A2. Taste	Bad taste	1	2	3	4	5	6	7	Good taste
	A3. Price	Expensive	1	2	3	4	5	6	7	Cheap
	A4. Quality	Bad quality	1	2	3	4	5	6	7	Good quality
	A5. Healthy	Not Healthy	1	2	3	4	5	6	7	Healthy
	A6. Trust	Not trustworthy	1	2	3	4	5	6	7	Trustworthy
	A7. Consistency	Tough	1	2	3	4	5	6		Tender
	A8. Animal welfare	Low welfare	1	2	3	4	5	6	7	High welfare
Yihao Tuzhu	A1. Safety	Not safe	1	2	3	4	5	6	7	Safe
	A2. Taste	Bad taste	1	2	3	4	5	6	7	Good taste
	A3. Price	Expensive	1	2	3	4	5	6	7	Cheap
	A4. Quality	Bad quality	1	2	3	4	5	6	7	Good quality
	A5. Healthy	Not Healthy	1	2	3	4	5	6	7	Healthy
	A6. Trust	Not trustworthy	1	2	3	4	5	6	7	Trustworthy
	A7. Consistency	Tough	1	2	3	4	5	6		Tender
	A8. Animal welfare	Low welfare	1	2	3	4	5	6	7	High welfare
NetEase	A1. Safety	Not safe	1	2	3	4	5	6	7	Safe
	A2. Taste	Bad taste	1	2	3	4	5	6	7	Good taste

Weiyang	A3. Price	Expensive	1	2	3	4	5	6	7	Cheap
	A4. Quality	Bad quality	1	2	3	4	5	6	7	Good quality
	A5. Healthy	Not Healthy	1	2	3	4	5	6	7	Healthy
	A6. Trust	Not trustworthy	1	2	3	4	5	6	7	Trustworthy
	A7. Consistency	Tough	1	2	3	4	5	6		Tender
	A8. Animal welfare	Low welfare	1	2	3	4	5	6	7	High welfare
Sushi	A1. Safety	Not safe	1	2	3	4	5	6	7	Safe
	A2. Taste	Bad taste	1	2	3	4	5	6	7	Good taste
	A3. Price	Expensive	1	2	3	4	5	6	7	Cheap
	A4. Quality	Bad quality	1	2	3	4	5	6	7	Good quality
	A5. Healthy	Not Healthy	1	2	3	4	5	6	7	Healthy
	A6. Trust	Not trustworthy	1	2	3	4	5	6	7	Trustworthy
	A7. Consistency	Tough	1	2	3	4	5	6		Tender
	A8. Animal welfare	Low welfare	1	2	3	4	5	6	7	High welfare
Jingqishen	A1. Safety	Not safe	1	2	3	4	5	6	7	Safe
	A2. Taste	Bad taste	1	2	3	4	5	6	7	Good taste
	A3. Price	Expensive	1	2	3	4	5	6	7	Cheap
	A4. Quality	Bad quality	1	2	3	4	5	6	7	Good quality
	A5. Healthy	Not Healthy	1	2	3	4	5	6	7	Healthy
	A6. Trust	Not trustworthy	1	2	3	4	5	6	7	Trustworthy
	A7. Consistency	Tough	1	2	3	4	5	6		Tender
	A8. Animal welfare	Low welfare	1	2	3	4	5	6	7	High welfare

**Q30. How often do you get information about pork from the following sources?** *Randomization*

Please, indicate on a scale from 1 (never) to 5 (often) how often you get information about pork from the following sources:

	Never (1)	(2)	(3)	(4)	Often (5)
Seller at market	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Staff in supermarket	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Displays in supermarkets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Info on pork package	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Advertising in mass media	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Online sales channels	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Food-related online fora	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Social media	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Personal communication by family/friends	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Demography:**

At last, we want ask a few questions about you (this data is anonymous).

**Q31. What is your age?**

- ☐ 20-25
- ☐ 26-30
- ☐ 31-35



- ☐ 36-40
- ☐ 41-45

**Q32. In which city do you live?**

- ☐ Beijing
- ☐ Shanghai
- ☐ Guangzhou
- ☐ Chengdu
- ☐ Hong Kong

**Q33. What is your marital status?**

- ☐ Married/cohabiting
- ☐ Single
- ☐ Divorced/widow
- ☐ Other
- ☐ Do not wish to disclose

**Q34. How many individuals over the age of 18 is there in your household?**

- ☐ One individual
- ☐ Two individuals
- ☐ Three individuals
- ☐ Four individuals
- ☐ Five individuals or more

**Q35. How many children (under the age of 18) is there in your household?**

- ☐ No children
- ☐ One child
- ☐ Two children
- ☐ Three children
- ☐ Four children
- ☐ Five children or more

**Q36. What is your highest level of education attained?**

- ☐ Primary School or Below
- ☐ Junior high school
- ☐ High school/ vocational school / technical school
- ☐ Junior college
- ☐ Employer/entrepreneur
- ☐ Others
- ☐ College or higher

**Q37. What is your annual income before taxes?**

- ☐ - Adjust to China
- ☐ Do not wish to disclose

**Q38. How would you describe the economic status of your household?**

- ☐ Difficult
- ☐ Modest
- ☐ Reasonable
- ☐ Well off

**Q39. What is your occupation?**

- ☐ I have no job
- ☐ Non-manual laborer
- ☐ Manual laborer
- ☐ Administrative worker
- ☐ Self-employed professional
- ☐ Farmer/agricultural worker

**Thank you very much for your time and collaboration.**

---

### Appendix 3: Photos of pork brands from main pork brands in China

Brand name	Picture	Brand name	Picture
Shuanghui	 A promotional image for Shuanghui Cold Fresh Meat. It features a green background with the Shuanghui logo (双汇 Shineway) and the text '双汇冷鲜肉' (Shuanghui Cold Fresh Meat). Below this, it says '国际标准 安全放心' (International Standard, Safe and Reliable) and '×八道检验 十八个放心' (8-step inspection, 18 points of confidence). The image shows various cuts of fresh pork.	Yurun	 A photograph of a Yurun Cold Fresh Meat store display. The background is green with the Yurun logo (雨润冷鲜肉) and the slogan '让千万家庭放心!' (Let tens of millions of families be at ease!). The display shows various cuts of fresh pork in a refrigerated case. A worker in a white uniform is visible in the background.
Jinluo	 A photograph of Jinluo Cold Fresh Meat products. The image shows several green plastic trays filled with different cuts of fresh pork, including ribs, loins, and other cuts. The trays are labeled with '金锣冷鲜肉' (Jinluo Cold Fresh Meat) and '加工工艺' (Processing Technology). Below the trays, there is a caption: '金锣冷鲜肉有258个品种339种规格供广大消费者选择' (Jinluo Cold Fresh Meat has 258 varieties and 339 specifications for consumers to choose from).	JINGQISHEN	 A photograph of a Jingqi Shen Cold Fresh Meat product. The image shows a large piece of fresh pork in a clear plastic tray. The tray is labeled with '精氣神-山黑猪特級肋排' (Jingqi Shen - Mountain Black Pig Special Grade Ribs) and '92.90'. The label also includes a barcode and other product information.

Chumuxiang



Sushi



Wens



NetEase  
Weiyang





Meal Boss		COFCO JOYCOME	
Yihao Tuzhu			

#### Appendix 4. Map of China's provinces



<https://sacu.org/provmap.html>