



United States Department of Agriculture



# China Projected to Be a Leading Meat Importer

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# The 1980s: where it began

Chinese people can eat meat and drink milk like foreigners do!

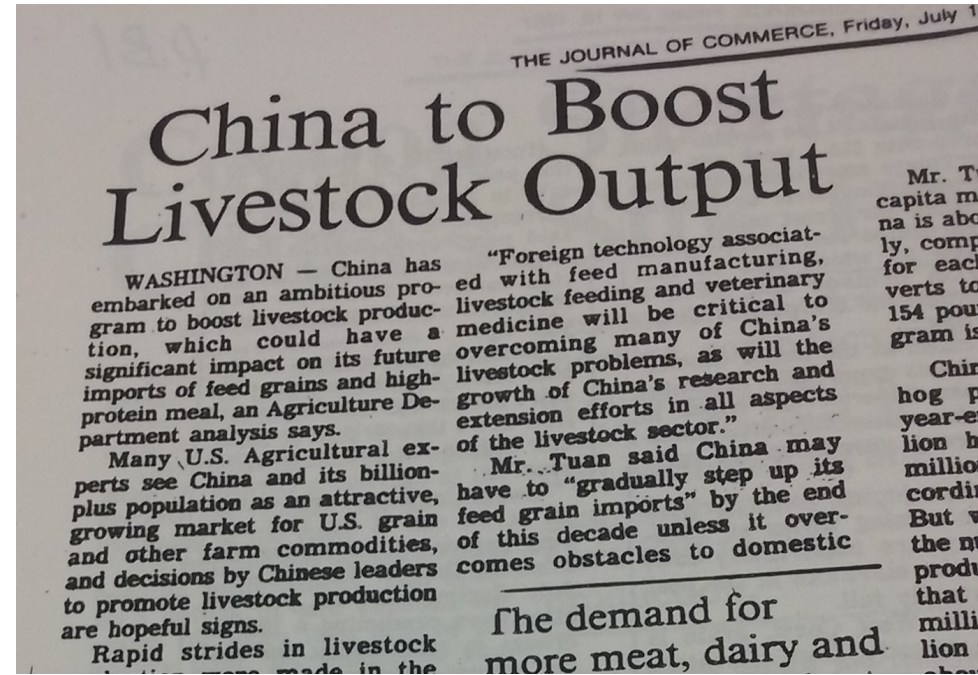
Feed milling can be a major industry in China



Hu Yaobang,  
General Secretary  
1982-87

Deng Xiaoping  
Top leader  
1978-89

These are paraphrases of speeches made in the 1980s



ERS report, 1986: “Foreign technology [in] feed manufacturing, livestock feeding and veterinary medicine will be critical to overcome China’s livestock problems.”  
“China may have to import cereal grains and soybean meal by [the end of the 1980s]”

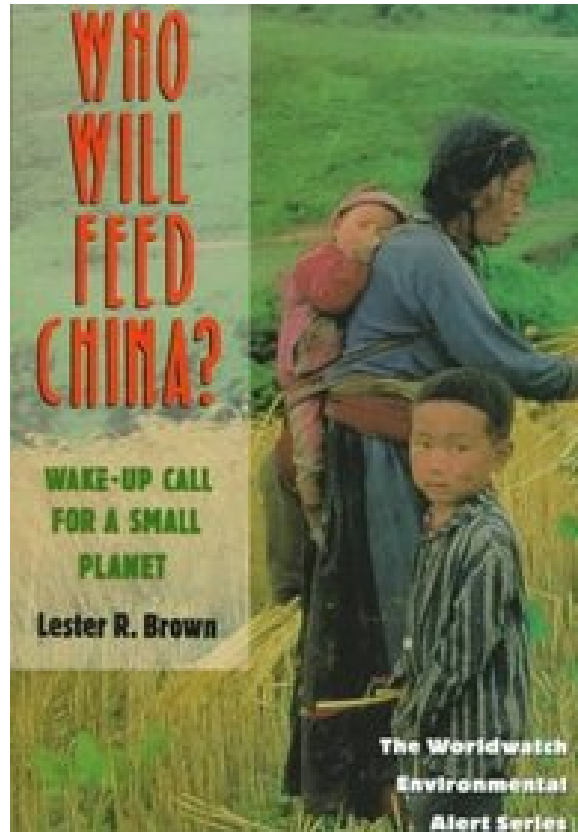




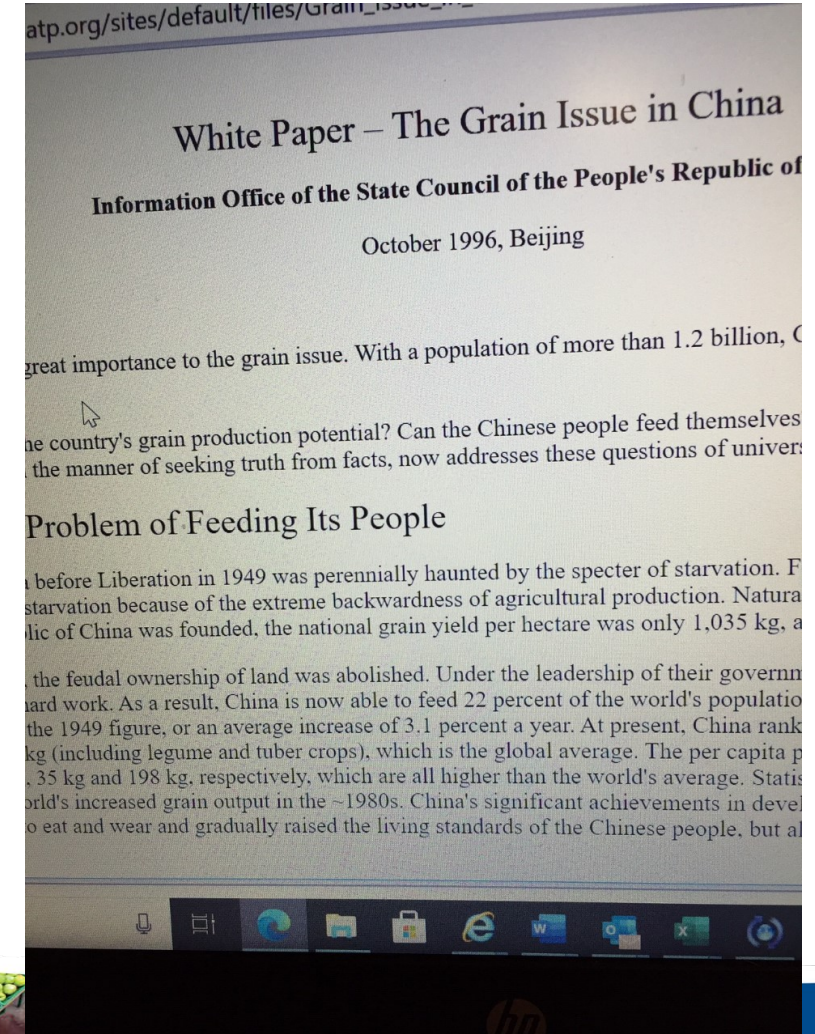
# 1990s: concerns focused on potential disruptions from China's grain imports to feed livestock

Lester Brown wrote an article in 1994 and published a book in 1995.

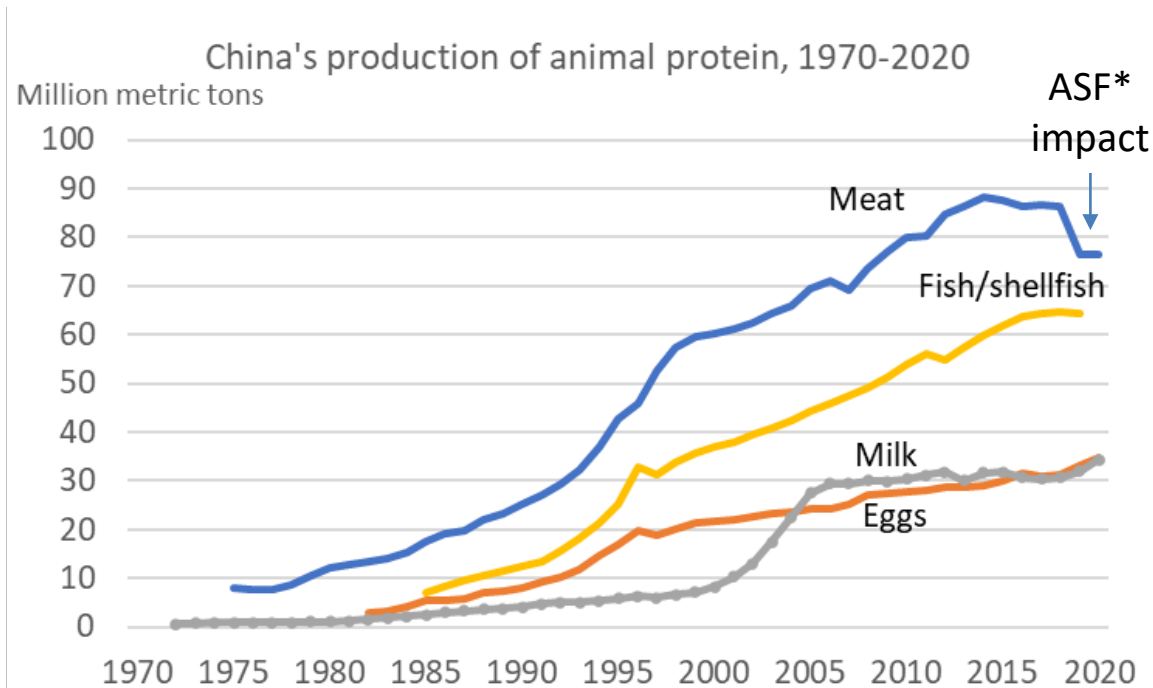
“Estimating China’s food deficit is a scary exercise.”



China’s State Council issued a rebuttal in 1996



# After decades of increase, China's animal protein output growth has decelerated...and meat output declined sharply in 2019



\*ASF = African swine fever epidemic (2018-19 in China).

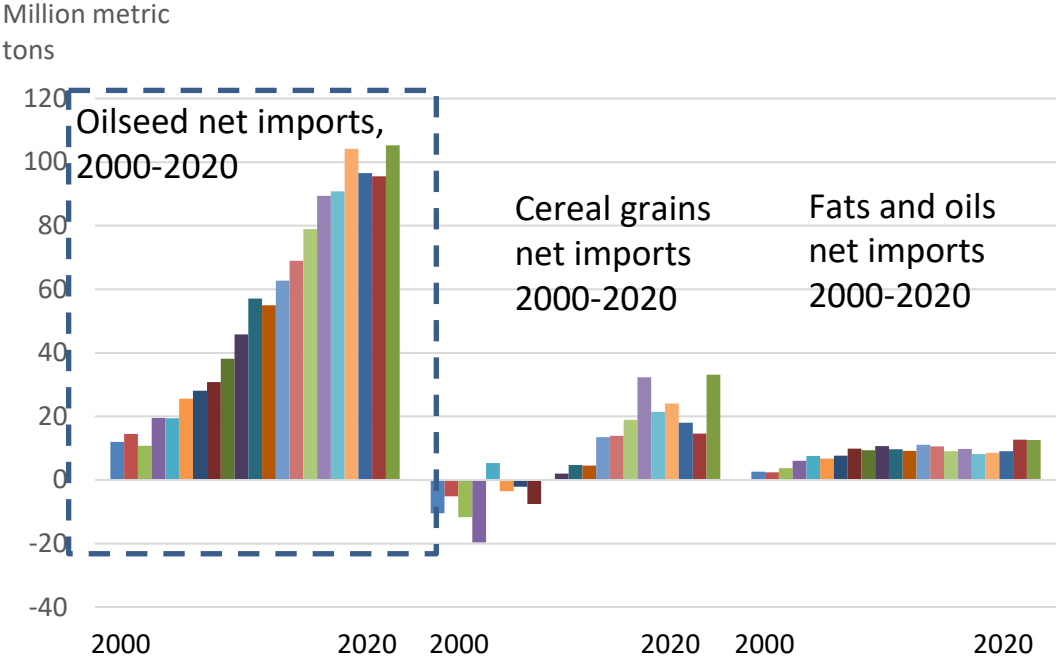
Source: ERS analysis of data from China National Bureau of Statistics.

- Growth was spurred by importing animal genetics, building feed mills, adding feed-efficient species (poultry/fish), importing soybeans, expanding domestic corn, vaccines
- Growth has slowed or plateaued
  - Disease epidemics continue
  - Feed costs are high
  - Pasture and land for industrialized farms is scarce
  - Authorities closed farms during 2014-17 to deal with environmental impacts
  - Over-fishing prompted curbs

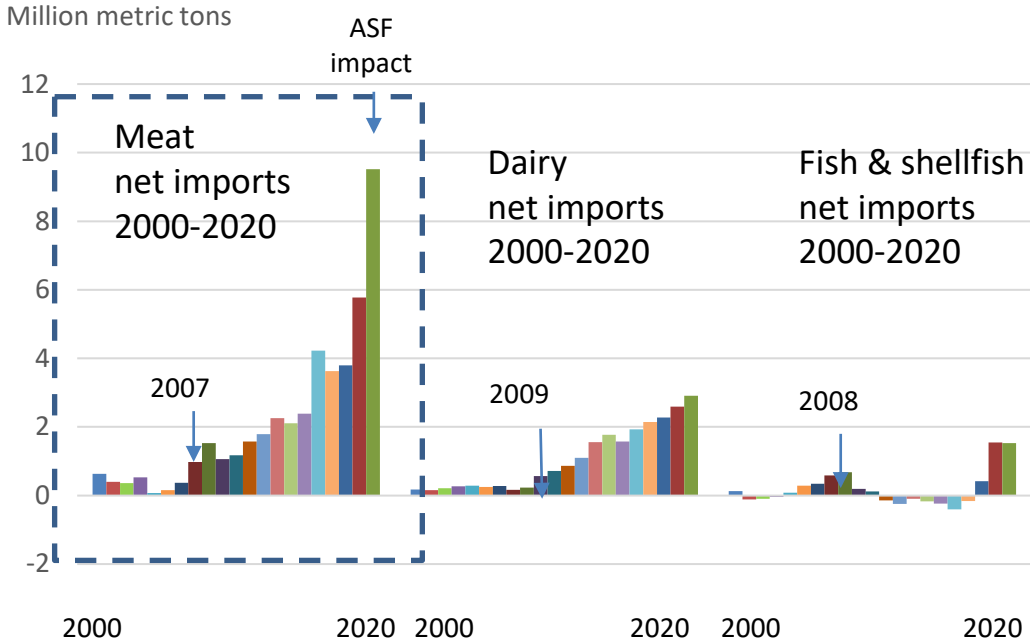


# Imports of oilseeds were the main impact on the global market until 2007-09 when China's imports of meat and dairy began to rise.

China's Net imports of oilseeds, cereals, oils, 2000-20



China's net imports of meat, dairy and fish, 2000-20

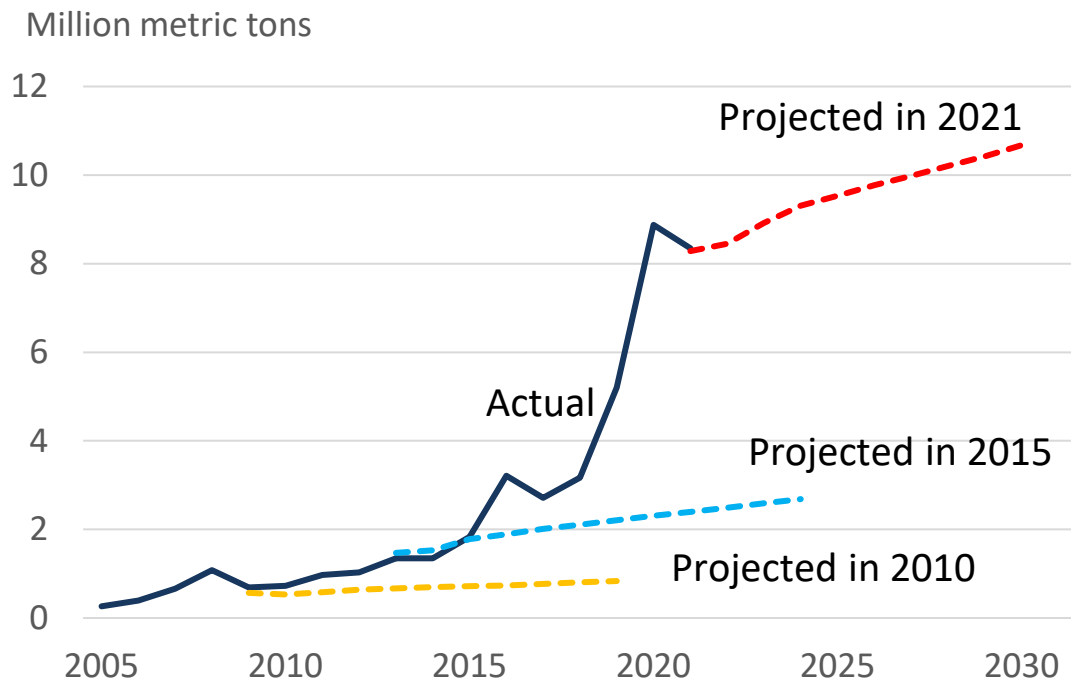


ASF = African swine fever epidemic (2018-19 in China)  
 Net imports = imports – exports. Calendar years.  
 Source: ERS analysis of China customs statistics.



# Past USDA projections underestimated China's potential as a meat importer

USDA projections of China's meat imports made  
in 2010, 2015, and 2021



Note: imports of beef, pork and poultry.

Source: USDA PS&D and USDA agricultural projections.

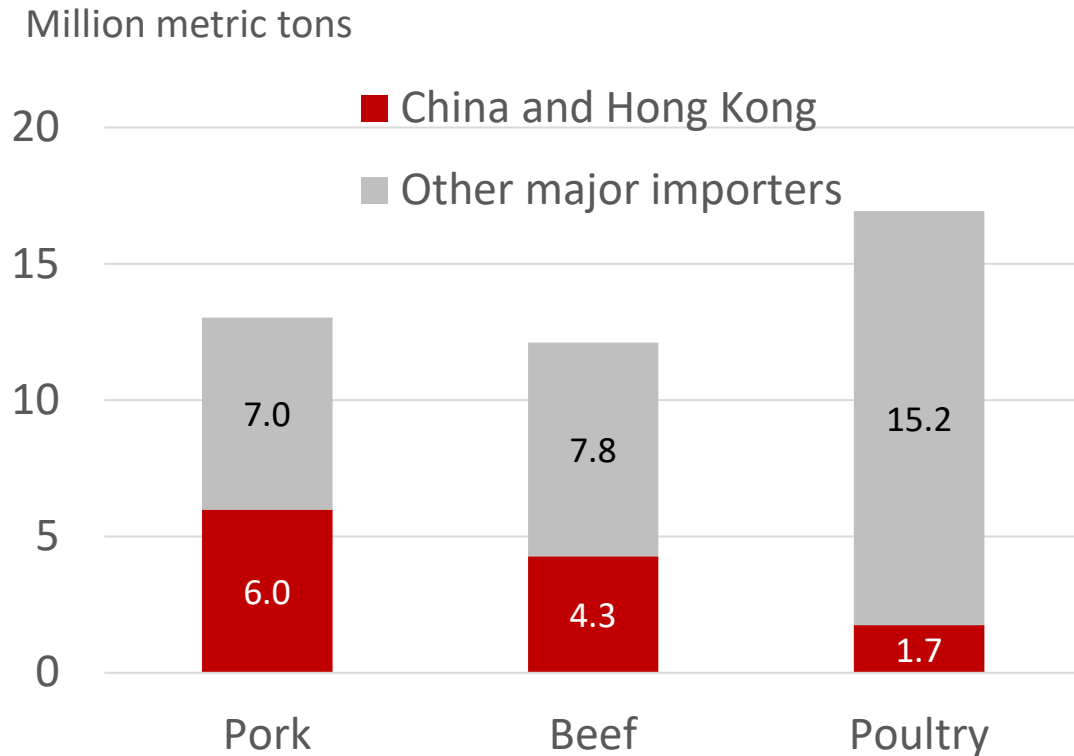
- In 2010, USDA projections showed China would import less than 1 mmt of meat per year through 2019
- In 2020, China imported about 9 million metric tons of meat
- In 2031, China is now projected to import 10.7 mmt of meat





# In 2030, China and Hong Kong combined will be the top pork and beef importing region and a leading importer of poultry

Projected Meat Imports, 2030



Top Four Meat Importing Regions Projected for 2030  
(million metric tons)

Pork	Volume	Beef	Volume	Poultry	Volume
China-HK	5.987	China-HK	4.264	N.Africa-ME	3.217
Japan	1.591	U.S.	1.523	Sub-Sah. Africa	2.425
Mexico	1.27	Japan	0.873	EU	2.007
S. Korea	0.778	S. Korea	0.76	China-HK	1.748

China-HK = China and Hong Kong combined.

N.Africa-ME = North Africa and the Middle East.

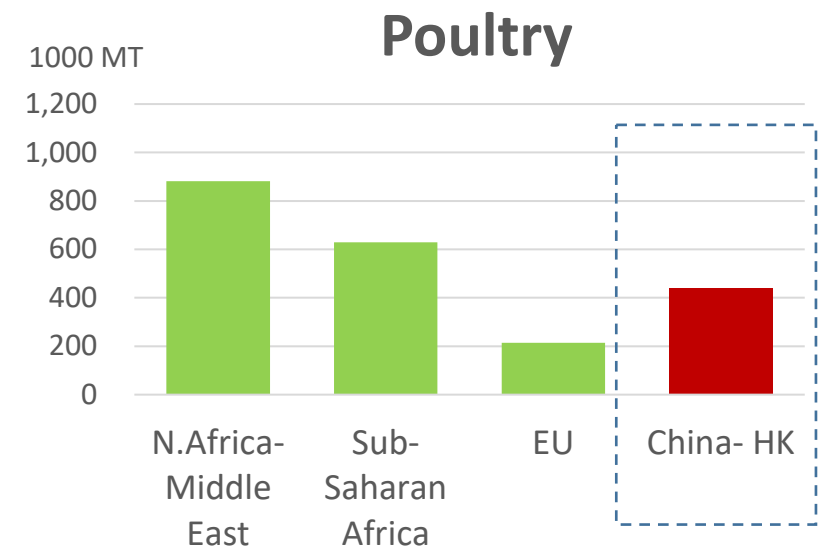
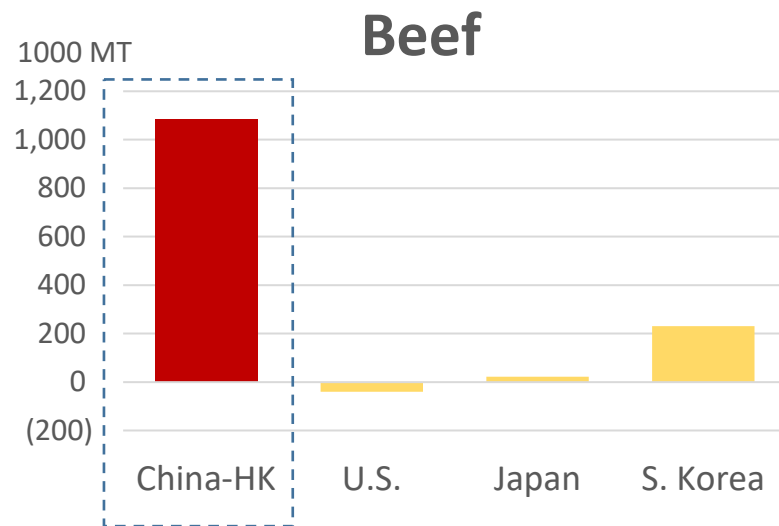
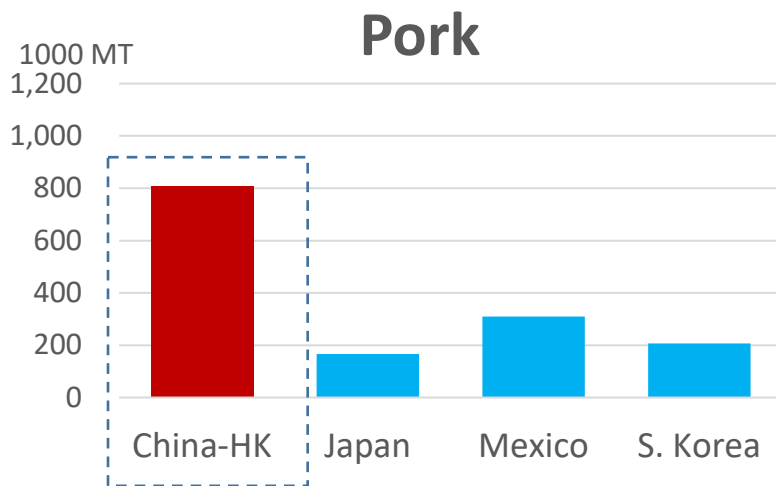
Sub.-Sah. Africa = Sub-Saharan Africa.

Source: USDA Agricultural Projections to 2030.



# China and Hong Kong will be a growing market for imported meat

## Change in projected meat imports, 2020 to 2030 Top four importing regions



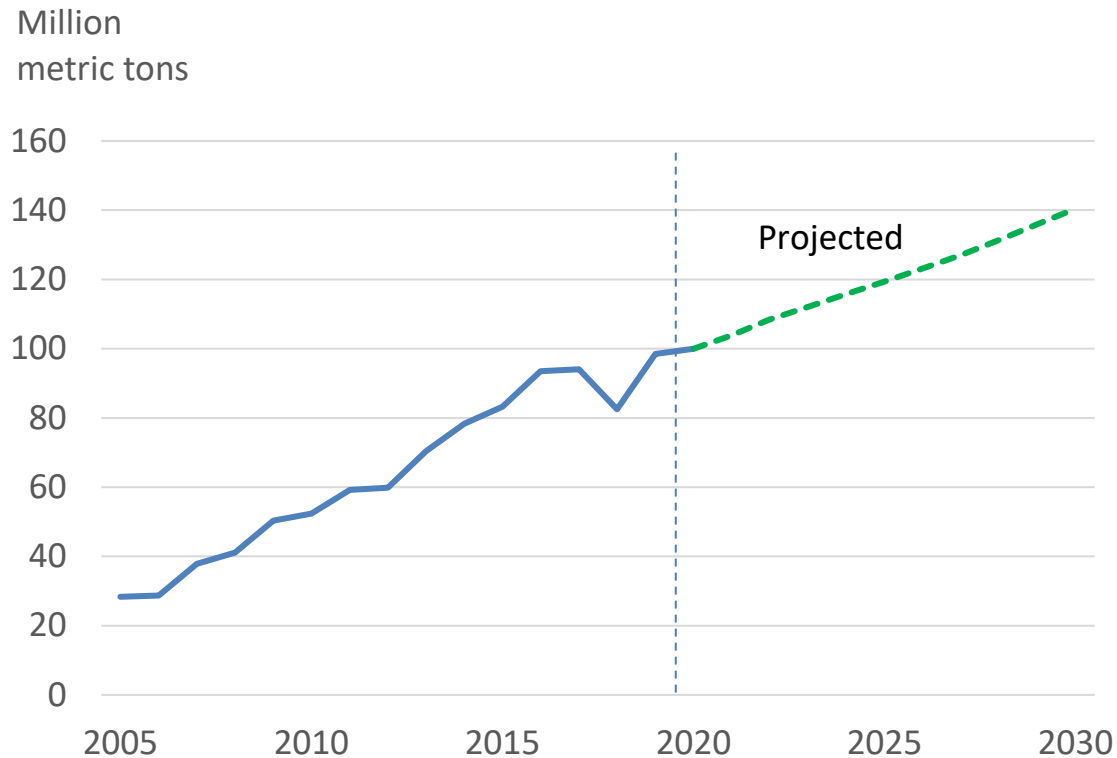
Source: USDA Agricultural Projections to 2030.



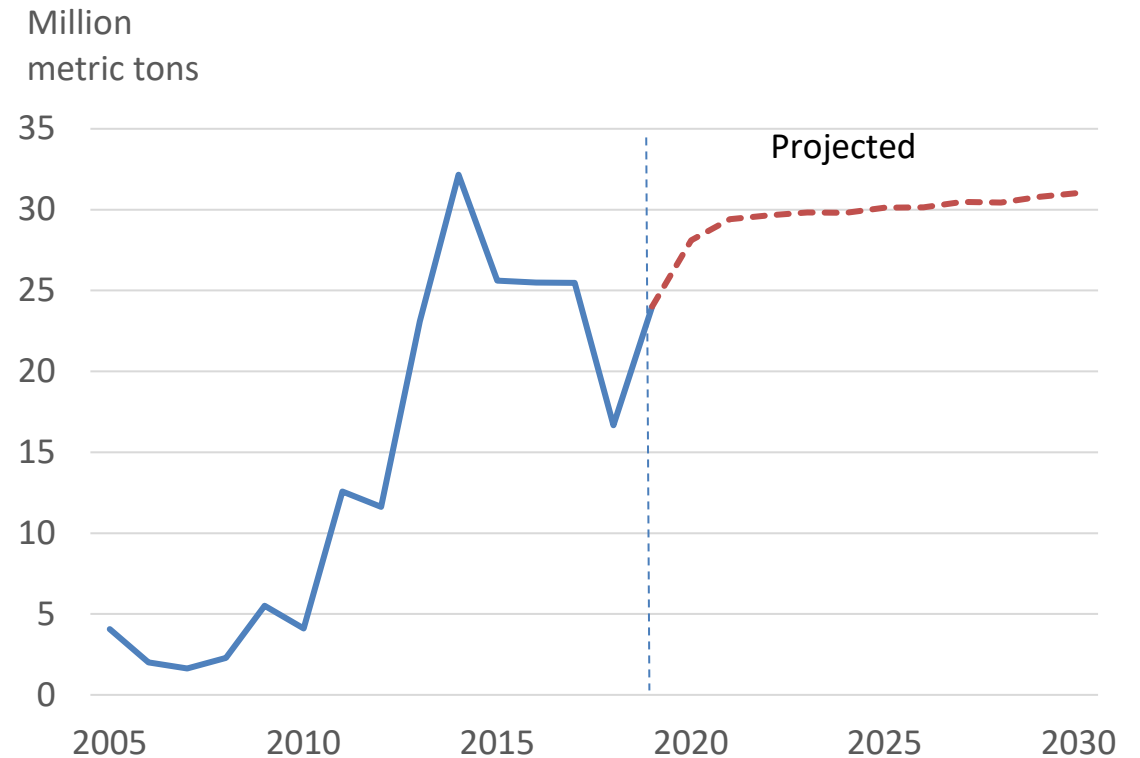


# China's soybean and grain imports projected to grow alongside growing meat imports

### China's soybean imports



### China's grain imports



Source: USDA Agricultural Projections to 2030.



# Growing meat imports raise issues

- In 2020, China adopted self-sufficiency targets for pork (95%), beef/mutton (80%), dairy (70%), poultry (100%)
- Will China restrict meat imports when Chinese pork prices fall toward normal levels?
- China is now implementing a strict disinfection and traceability system for imported frozen meat and seafood.
- Food security policy: accepting reliance on imported soybeans and controlled increase in corn imports
- Imported whey is critical for pigs, alfalfa for dairy
- Breeding stock imports: China's leadership prioritized self-reliance in seeds and breeding stock in 2021



During the 1970s a campaign exhorted China's communes to raise more pigs. A much bigger campaign is underway now to restore pork supplies.



For more, see China topic page at <http://www.ers.usda.gov>

Topics > International Markets & U.S. Trade > Countries & Regions > China

- Interdependence of China, United States, and Brazil in Soybean Trade, 2019
- China's Pork Imports Rise Along with Production Costs, 2017
- China's Dairy Supply and Demand, 2017
- "China as Dairy Importer: Rising Milk Prices and Production Costs," *International Food and Agribusiness Management Review*, 2016
- Development of China's Feed Industry and Demand for Imported Commodities , 2015
- "China in the Next Decade: Rising Meat Demand and Growing Imports of Feed," *Amber Waves*, 2014

