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

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]”

These are paraphrases of speeches made in the 1980s

Hu Yaobang, General Secretary 1982-87
Deng Xiaoping, Top leader 1978-89

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


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

- 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

- 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

Note: imports of beef, pork and poultry.
Source: USDA PS&D and USDA agricultural projections.
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

<table>
<thead>
<tr>
<th></th>
<th>Pork</th>
<th>Beef</th>
<th>Poultry</th>
</tr>
</thead>
<tbody>
<tr>
<td>China and HK</td>
<td>6.0</td>
<td>4.3</td>
<td>1.7</td>
</tr>
<tr>
<td>Other major importers</td>
<td>7.0</td>
<td>7.8</td>
<td>15.2</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>Pork</th>
<th>Beef</th>
<th>Poultry</th>
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</thead>
<tbody>
<tr>
<td>China-HK</td>
<td>5.987</td>
<td>4.264</td>
<td>1.748</td>
</tr>
<tr>
<td>Japan</td>
<td>1.591</td>
<td>1.523</td>
<td>N.Africa-ME 3.217</td>
</tr>
<tr>
<td>Mexico</td>
<td>1.27</td>
<td>Japan</td>
<td>Sub-Sah. Africa 2.425</td>
</tr>
<tr>
<td>S. Korea</td>
<td>0.778</td>
<td>S. Korea</td>
<td>EU 2.007</td>
</tr>
</tbody>
</table>

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

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](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
- Development of China's Feed Industry and Demand for Imported Commodities, 2015