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China agricultural outlook 2026-2035

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DCZ Expert Study

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EXECUTIVE SUMMARY

China's Agricultural Outlook Report (the Outlook) for 2026–2035 anticipates continued growth in domestic production, slower consumption growth, and a gradual reduction in agricultural import dependence, broadly reflecting the government's food-security and agricultural-modernization priorities. Total grain production is projected to increase from 715 million tons in 2025 to 753 million tons by 2035, supported by yield improvements, high-standard farmland, advanced seeds, mechanization, irrigation, digitalization, and biotechnology. Soybeans will remain China's most significant external vulnerability, despite plans to raise domestic production to 32.3 million tons and reduce imports to 82.5 million tons by 2035. Meat consumption is expected to remain relatively stable, but the sectoral structure will shift, with declining pork production and imports alongside continued growth in beef and dairy demand. The Outlook is subject to substantial uncertainty arising from slower economic growth, demographic decline, geopolitical tensions, trade restrictions, energy-price volatility, animal disease, and increasingly severe climate events. Previous errors in China's forecasting model CAMES and major differences between Chinese and OECD/FAO and USDA projections suggest that long-term trade forecasts should be interpreted as policy-oriented scenarios rather than precise market predictions.

Key messages

- China is expected to raise total grain production from 715 million tons in 2025 to 753 million tons by 2035 while keeping the cultivated grain area broadly stable.
- Productivity growth will depend increasingly on high-standard farmland, improved seeds, biotechnology, mechanization, digital agriculture, irrigation, and more efficient farming practices.
- China's overall grain imports are projected to decline to 115 million tons by 2035, although structural constraints will prevent the country from becoming fully self-sufficient in land-intensive commodities.
- Soybeans will remain China's principal agricultural import dependency, despite a projected 60% increase in domestic production and substantial efforts to diversify suppliers and substitute alternative feed ingredients.
- Domestic overcapacity and demographic decline are expected to reduce pork production, consumption, prices, and import demand over the outlook period.
- Beef and dairy offer stronger long-term demand prospects, with imports projected to rise as consumption growth continues to outpace domestic production.
- China's agricultural trade will become more strategically managed, diversified, and increasingly shaped by geopolitical relations, food-security concerns, and trade retaliation.
- The reliability of the CAMES projections remains uncertain, particularly for agricultural imports, because previous forecasts significantly underestimated soybean, beef, corn, and total meat trade volumes.

1. Introduction

On 20 April 2026, the Market Early Warning Expert Committee, in collaboration with the Department of Market and Informatization of the Chinese Ministry of Agriculture and Rural Affairs (MARA), released the **China Agricultural Outlook Report 2026-2035** at an unveiling conference held on the Chinese Academy of Agricultural Sciences (CAAS) campus in Beijing. This annual report provides a comprehensive overview of the agricultural sector in 2025, alongside projections for production, consumption, and trade trends from 2026 to 2035. This analysis reviews the key projections, evaluates the reliability of the forecasts, and discusses the implications for stakeholders in both domestic and international agri-food sectors.

2. Methods

Since 2014, the China Agricultural Outlook has been released annually as a collaborative effort between the Market Early Warning Expert Committee, the Department of Market and Informatization of MARA, the Agricultural Information Institute of CAAS, and other relevant agricultural institutions in China, and is modeled after the USDA and FAO agricultural outlooks.

The **2026-2035** edition of China agricultural outlook, which incorporates macroeconomic, demographic, currency exchange rate, and oil price data, offers projections for China's agricultural sector. The research team responsible for simulating these projections employed the China Agricultural Monitoring and Early-Warning System (CAMES) model. CAMES draws from a wide array of data sources, including the Chinese Ministries of Natural Resources, Agriculture and Rural Affairs, Water, and Commerce; Chinese Customs; the National Bureau of Statistics; the National Weather Bureau; and academic institutions such as CAAS, the Chinese Academy of Sciences (CAS), and the Chinese Academy of Social Sciences (CASS). It also integrates international data from organizations such as FAO (Food and Agriculture Organization of the United Nations), OECD (Organisation for Economic Co-operation and Development), IMF (International Monetary Fund), World Bank, IFPRI (International Food Policy Research Institute), USDA (United States Department of Agriculture), and G20-AMIS (Group of Twenty Agricultural Market Information System) to provide comprehensive and sector-specific projections across 11 key areas of agriculture and 20 different agricultural commodities.

3. Chinese agriculture in 2025

3.1 Grain

In 2025, China's total sown cropland area amounted to 119 million hectares and total grain production reached 715 million tons, marking a 1.2% increase compared to the prior year. This included 150 million tons from the summer harvest, 28.5 million tons from the early rice harvest, and 537 million tons from the fall harvest (MARA, 2026).

In 2025, overall coarse **grain production** reached 660 million tons, reflecting a 1.2% increase. However, the rice harvest increased by 0.7% to 209 million tons, and wheat production decreased by 0.1% to 140 million tons. Corn production rose to 301 million tons, a 2.1% increase, while soybean production reached 20.9 million tons, an increase of 1.3% from 2024. Potato production reached 30.7 million tons.

Grain consumption in 2025 totaled 832 million tons, reflecting a 0.9% annual increase. Grain for human consumption stood at 275 million tons, a decline of 0.9%, while feed and industrial grain consumption reached 385 million tons and 128 million tons respectively. Rice and wheat consumption reached 201 and 141 million tons respectively in 2025, largely due to some cheaper wheat being used as feed instead of more expensive corn. Corn consumption increased by 1.8% to 319 million tons, soybean consumption rose by 6.8% to 116 million tons, driven by domestic demand increase for feed grains.

Historically, China's total grain production increased from 462 million tons in 2000 to 715 million tons by 2025, as shown in Figure 1. This significant achievement is largely attributed to increased mechanization, technological advancements, institutional reforms like the household responsibility system, and additional grain production increase campaigns.

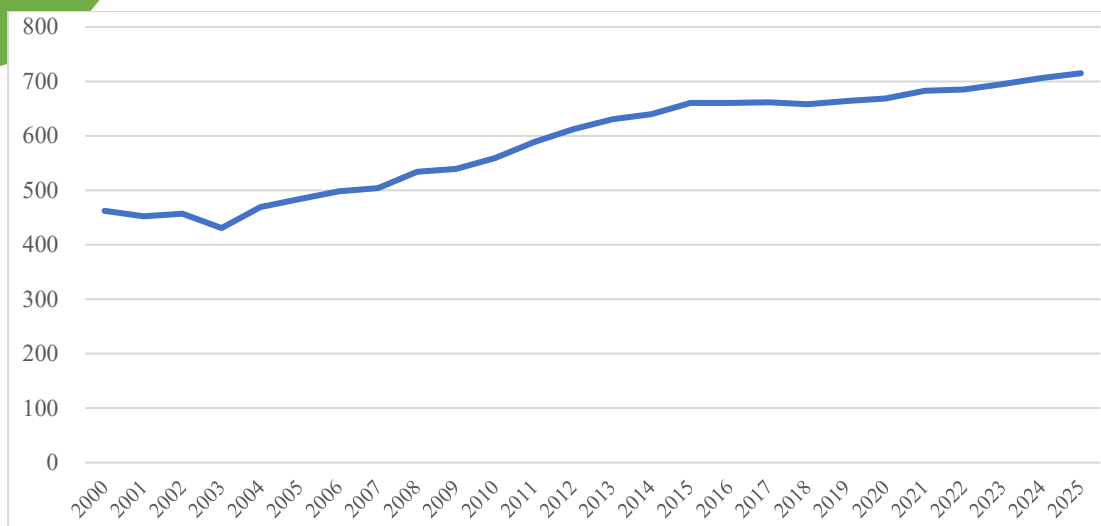


Figure 1: Historical grain production in China 2000-2025 (million tons) (NBS, 2026)

Grain imports in 2025 reached 141.9 million tons, a decline of 10.3%, of which soybeans constituted the largest share, followed by wheat, corn, and others at 111, 4, and 3 million tons, respectively, as shown in Figure 2. Brazil (59.7%), US (12%), Australia (7%), and Argentina (6.5%) remained the top sources of overall grain imports. Corn imports declined by 64% to 2.64 million tons. Historically Chinese grain imports declined from their peak in 2022, which was 161 million tons. Meanwhile, Chinese **grain exports** increased by 47% to 4.03 million tons, though they still remain relatively small in comparison to overall production and consumption levels in China.

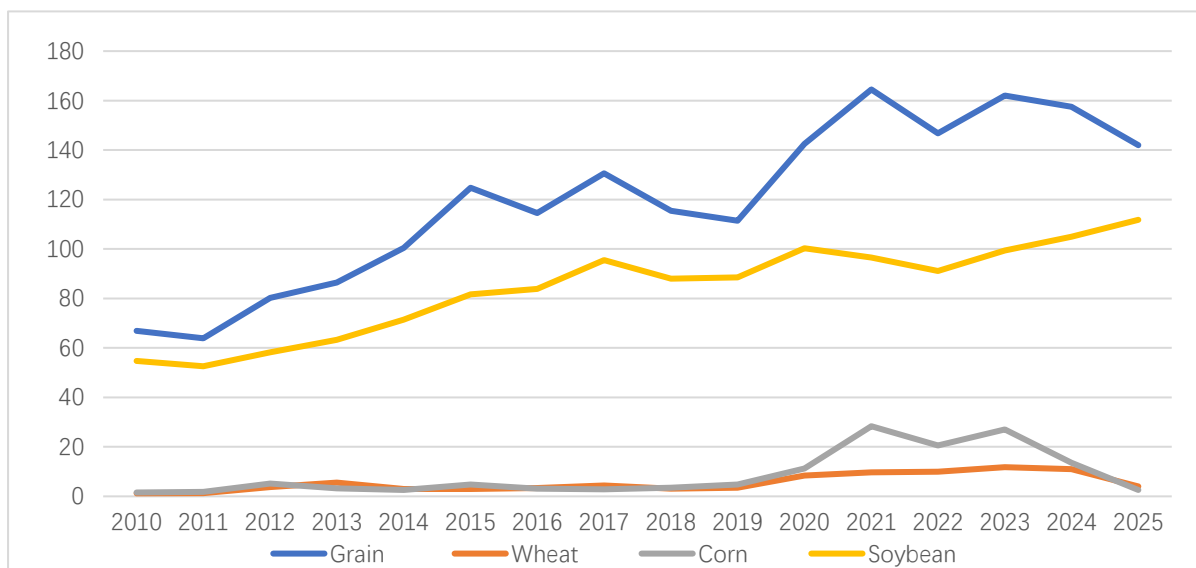


Figure 2: Chinese grain imports 2010-2025 (million tons) (NBS, 2026)

China has the lowest self-sufficiency rate in **soybeans** among all major grain categories. In 2025, China's soybean consumption reached 115.7 million tons, while domestic output stood at only around 20 million tons. To meet this large supply gap, China imported approximately 112 million tons of soybeans, mainly from overseas suppliers, as shown in Figure 3. This highlights China's continued heavy dependence on international markets for soybean supply. In 2025, soybean imports saw a 6.5% increase, reaching historic 112 million tons, with Brazil and the US being the leading suppliers. However, due to the renewed trade war with the US, soybean imports from the US declined dramatically.

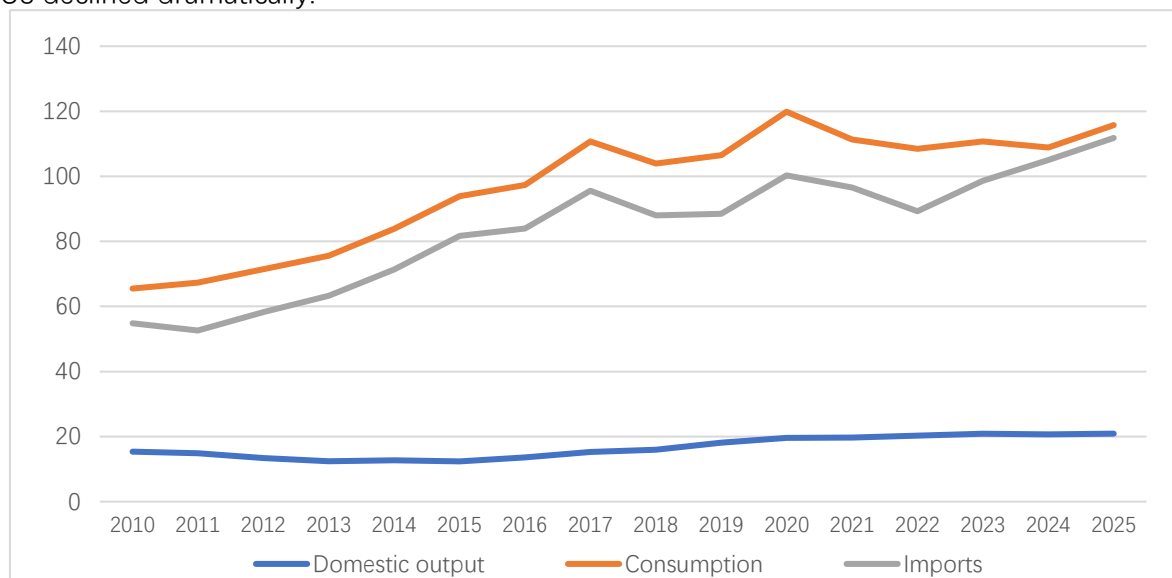


Figure 3: Chinese soybean data 2010-2025 (million tons) (NBS, 2026)

3.2 Meat sector

In 2025, overall meat production reached 101.9 million tons, reflecting a 4.2% increase as shown in Figure 4, while meat consumption rose to 105.3 million tons, marking a 3.2% increase. Meat prices continued to decline, largely due to overcapacity in the pork sector. Meat imports experienced a strong decline, falling by 9.7% to 4.82 million tons.

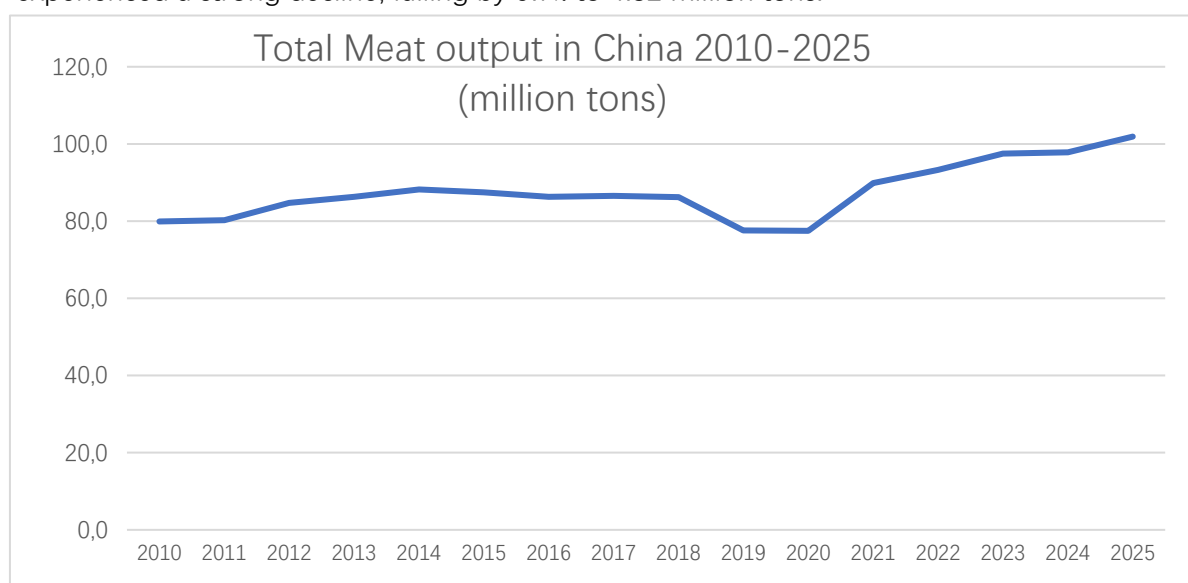


Figure 4: Chinese meat production 2010-2025 (million tons) (NBS, 2026)

3.2.1 Pork

In 2010, Chinese pork production stood at 51.4 million tons, rose to 54 million tons in 2018, and then decreased to 41 million tons during the 2019-2020 African swine fever (ASF) outbreak. In 2025, pork production recovered to 59 million tons, almost half of the global output, as shown in Figure 5. Chinese pork consumption stood at 60.2 million tons in 2025.

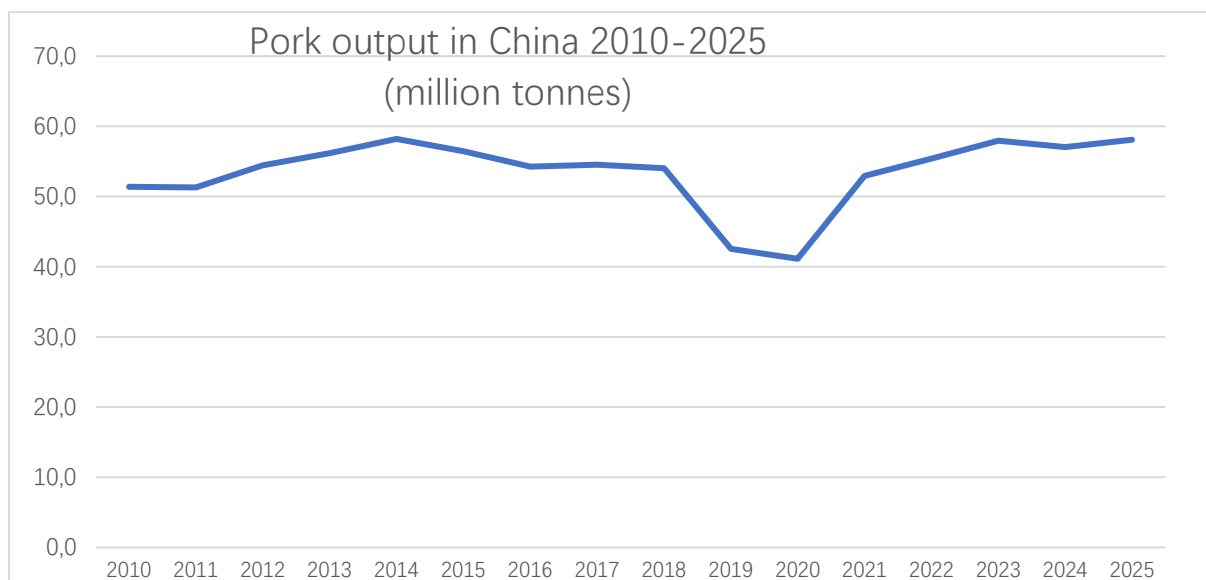


Figure 5: Chinese pork production 2010-2025 (million tons) (NBS, 2026)

In 2016, Chinese pork imports stood at 1.62 million tons and increased to 4.39 million tons during the 2019-2020 ASF outbreak. By 2025, pork imports had decreased to 0.98 million tons, as shown in Figure 6. In 2025, the major pork suppliers to China include Spain, Brazil, Chile, the Netherlands, and the United Kingdom (UK).

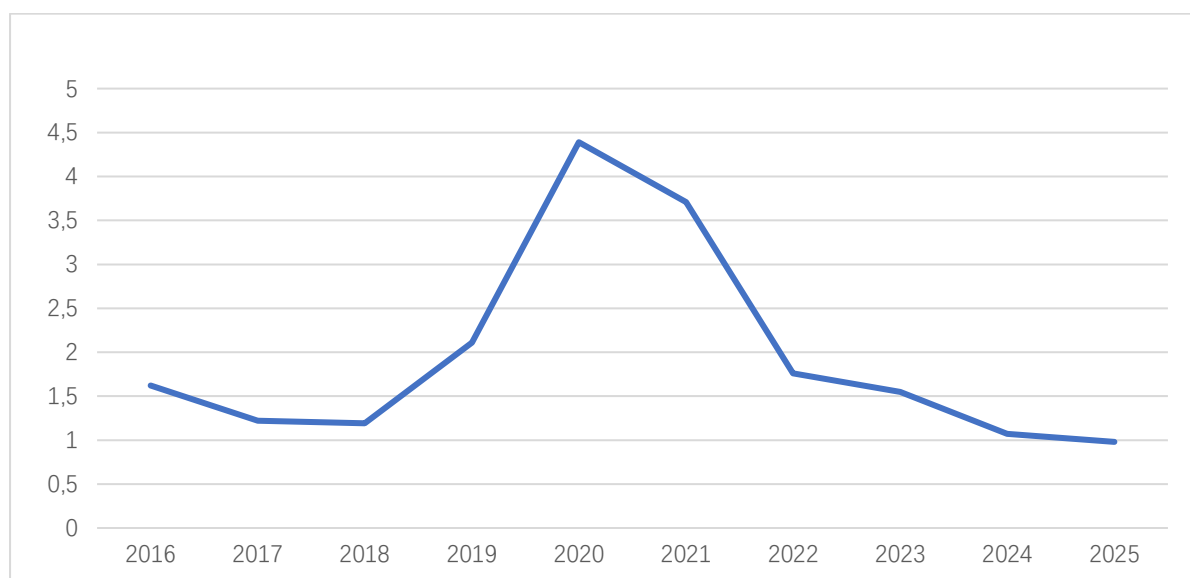


Figure 6: Chinese pork imports 2016-2025 (million tons) (NBS, 2026)

Pork prices have been consistently falling in China since the pork sector recovered from ASF in 2023. Pork prices have dropped from RMB 33/kg in 2024 to RMB 22/kg in 2025, as shown in Figure 7.

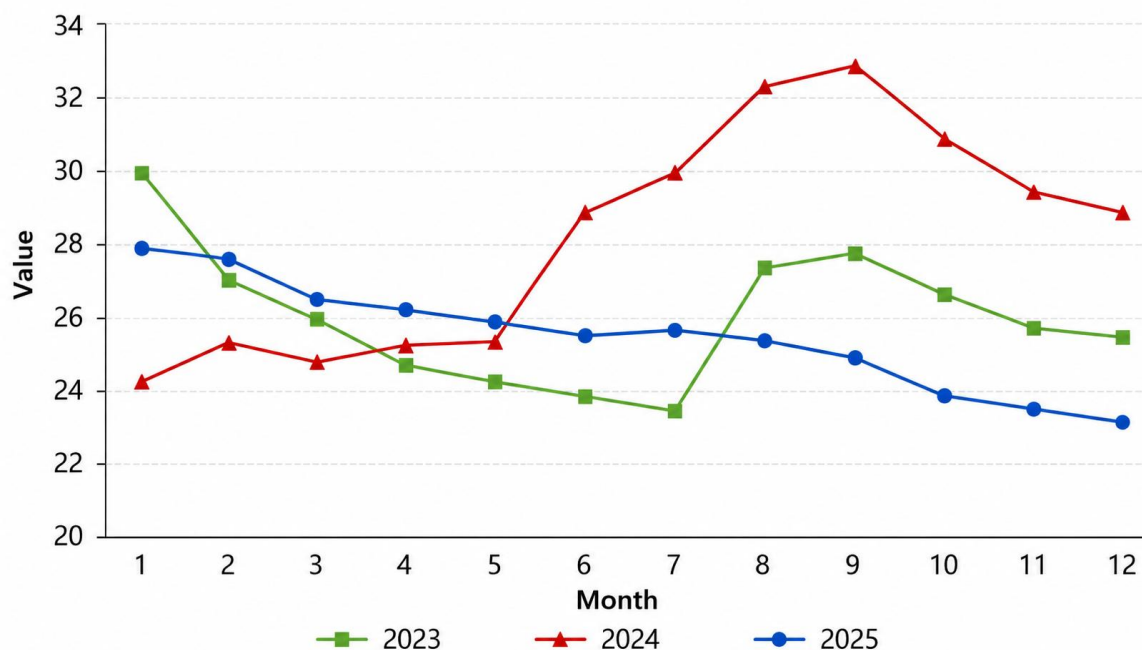


Figure 7: Changes in Chinese pork prices (RMB/kg) 2023-2025 (MARA, 2026)

In 2026, pork prices in China declined further, falling to RMB 14,730 per ton (RMB 14.73/kg) as of 5 June 2026. For the first time since the 2018–2019 ASF outbreak, domestic pork prices dropped below the international benchmark price of RMB 15,213 per ton (RMB 15.21/kg) on the Chicago Mercantile Exchange (CME), as shown in Figure 8. Although the Chinese government has introduced some measures to stabilize the market and halt the price decline, these efforts have so far had limited impact.

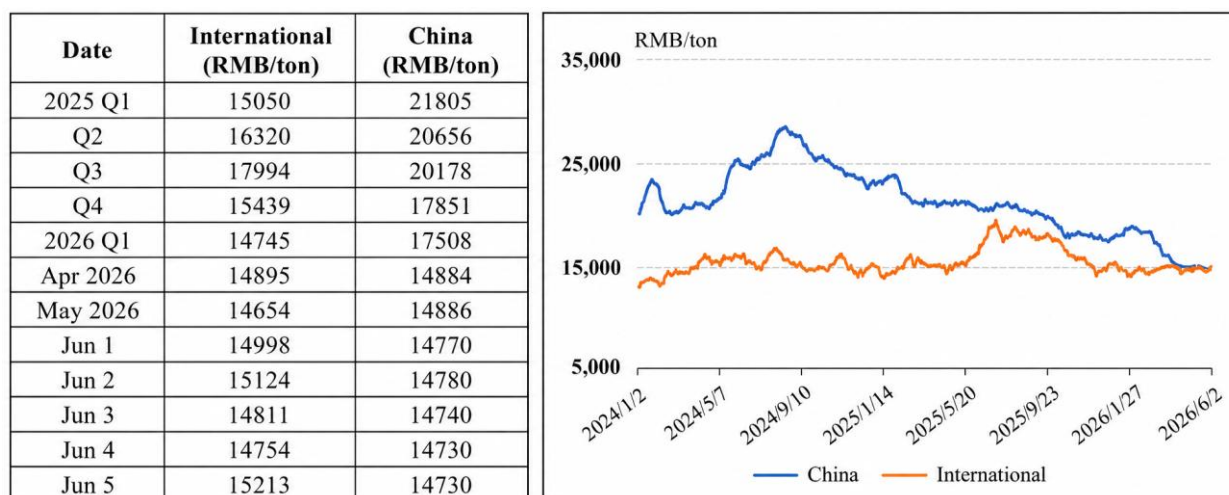


Figure 8: Pork prices change as of June 2026 (MARA, 2026 & USDA, 2026)

3.2.2 Beef

Beef production in 2025 stood at 8 million tons, with consumption rising to 10.8 million tons, also showing a 4% increase. Beef imports decreased slightly to 2.8 million tons which is worth USD 14.8 billion, a 2.5% drop, with Brazil, Argentina, and Australia as the leading suppliers.

3.2.3 Poultry

Poultry production in 2025 reached 28.4 million tons, while consumption climbed to 27.7 million tons, marking a 4.2% increase. Poultry imports also experienced a strong decline, falling by 29% to 0.7 million tons, while poultry exports reached 1.28 million tons in 2025. Brazil, the US, Russia, and Thailand remained the primary sources of poultry imports.

3.3 Aquatics

Aquatic production in 2025 reached 76.6 million tons, while consumption climbed to 79.1 million tons, marking a 4% increase. Aquatic imports also experienced a slight decline, falling by 0.6% to 7.1 million tons. Russia, Ecuador, Peru, Vietnam, Norway, India, and Chile remained the primary sources of aquatics imports. On the other hand, aquatic exports reached 4.58 million tons in 2025 and Japan, the US, South Korea, and Hong Kong were major export destinations for Chinese aquatic products.

3.4 Dairy sector

In 2025, overall dairy production reached 41.68 million tons, reflecting a 0.3% increase. At the same time, dairy consumption fell slightly to 58.05 million tons. Fresh milk prices continued to drop, settling at RMB 3.06/kg, largely due to a slight oversupply. Dairy imports also saw a decrease, falling by 1% to 16.6 million tons as shown in Figure 9. Australia, the European Union (EU), and New Zealand remained the top three sources of dairy imports for China.

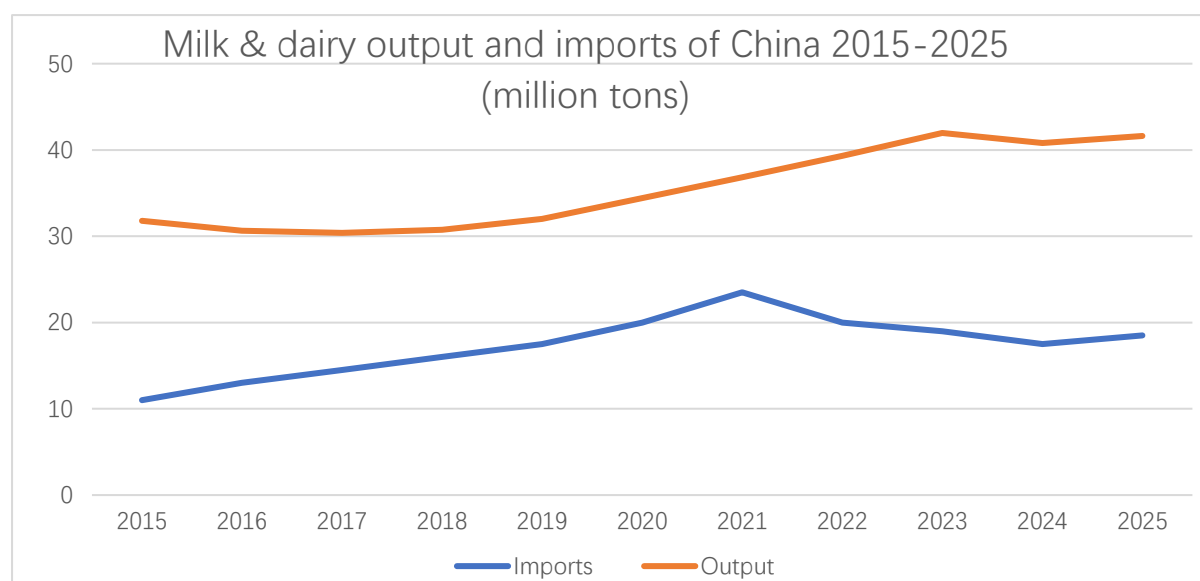


Figure 9: Chinese milk and dairy output and imports 2015-2025 (million tons) (NBS, 2026)

Chinese fresh milk prices have been steadily declining since 2021. By the end of 2025, the price had fallen to RMB 3.02/kg, an all-time low as shown in Figure 10. Analysts attribute the decline to mechanization, market maturation, industry consolidation, and overcapacity in the dairy sector,

mirroring the dynamics in the pork sector.

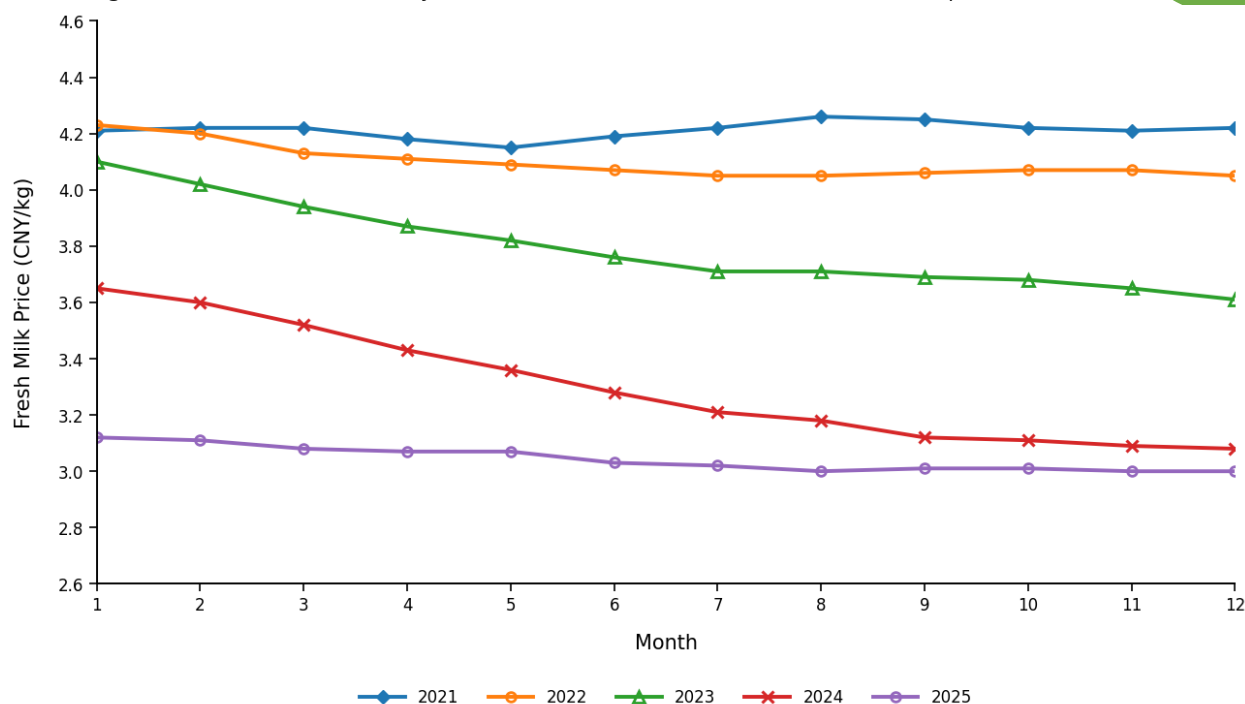


Figure 10: Changes in Chinese fresh milk prices (RMB/kg) 2021-2025 (MARA, 2026)

4. Projections for China's grain sector 2026-2035

4.1 Overall grain projections

4.1.1 Production

The Outlook model forecasts that China's planted grain area will remain stable at 119 million hectares through 2026, 2030, and 2035. According to the CAMES model, grain production in China is projected to reach 716 million tons in 2026, 732 million tons in 2030, and 753 million tons in 2035, as shown in Figure 11. These projections are in line with the government's 15th Five-Year Plan, which would bring total production to 725 million tons by 2030 (Rouzi, 2026).

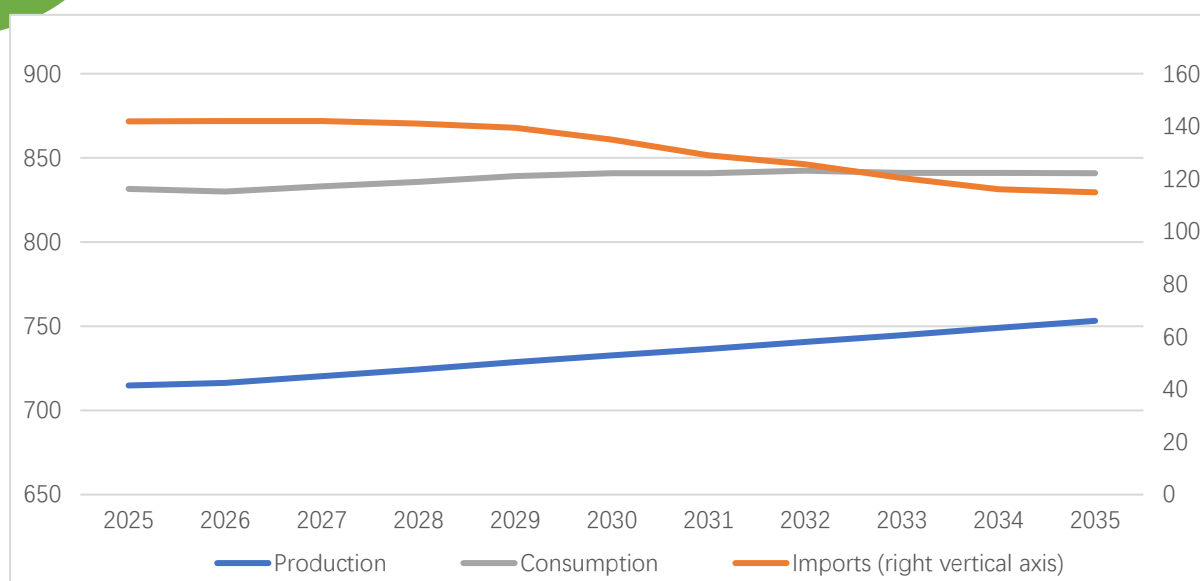


Figure 11: Overall grain projection for China 2026-2035 (million tons) (MARA, 2026)

The potential production increase is expected to result from stable cropland area, yield improvements through the “high standard farmland construction” initiative 1, increased mechanization, technological advancements in seed development, and progress in irrigation techniques (Wei et al., 2025).

4.1.2 Consumption

The CAMES model also projects that grain consumption will stand at 830 million tons by 2026, 840.8 million tons by 2030, and 840.8 million tons by 2035 (Figure 11), with a modest annual increase of 0.1%. Animal feed grain consumption is expected to reach 384 million tons by 2026, 389.5 million tons by 2030, and 388.4 million tons by 2035. However, the Outlook suggests that the consumption increase will gradually slow down and then decrease, due to China’s aging and shrinking population.

4.1.3 Trade

Furthermore, the Outlook projects a decrease in overall grain trade from 2026 to 2035. Grain imports are anticipated to decline to 142 million tons in 2026, 135 million tons in 2030, and 115 million tons by 2035, marking a 22% reduction compared to other projections like those by the USDA and FAO. Conversely, China’s grain exports, though still relatively small, are expected to grow from 4 million tons in 2025 to 8 million tons by 2035. China is also expected to diversify its agricultural trade during this period, especially with countries of the Belt and Road Initiative and the Regional Comprehensive Economic Partnership (RCEP).

1 High-standard farmland construction (高标准农田建设) is a Chinese government initiative to upgrade agricultural land through investments in irrigation, drainage, soil improvement, field consolidation, and agricultural infrastructure. The program aims to increase productivity, improve resilience to climate change, and strengthen China’s long-term food security by creating stable, high-yield farmland suitable for modern, mechanized agriculture.

4.2 Wheat projections

China's wheat production is projected to rise gradually, reaching 139.3 million tons in 2026, 139.7 million tons in 2030, and 140.7 million tons in 2035, equivalent to an average annual growth rate of 0.1% (Figure 12). Wheat consumption is forecast to reach 135.6 million tons in 2026, 136.8 million tons in 2030, and 140.4 million tons in 2035, remaining broadly stable compared with the 2025 level. Meanwhile, wheat imports are expected to decline from 7.0 million tons in 2026 to 4.8 million tons in 2030 and 4.1 million tons in 2035, indicating a sustained downward trend over the forecast period.

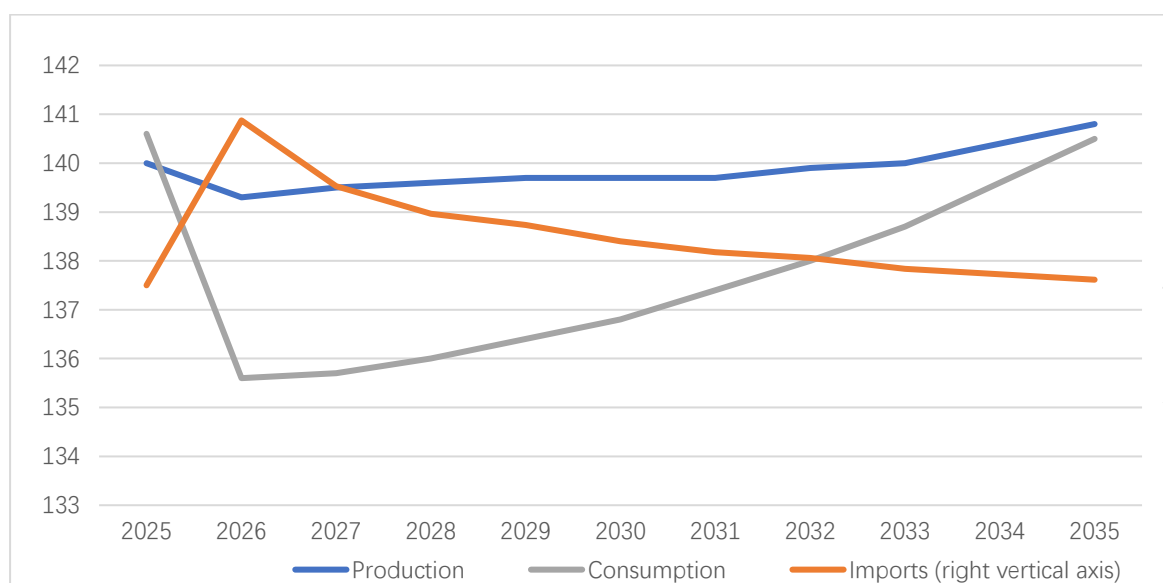


Figure 12: Wheat projection for China 2026-2035 (million tons) (MARA, 2026)

4.3 Rice projections

China's rice production is projected to decline gradually, reaching 208 million tons in 2026, 206 million tons in 2030, and 207 million tons in 2035, an overall decrease of 1% (Figure 13). Rice consumption is forecast to reach 201 million tons in 2026, 195 million tons in 2030, and 194 million tons in 2035, indicating a sustained downward trend over the forecast period, due to population decrease. Meanwhile, rice imports are expected to decline from 4.3 million tons in 2026 to 3.4 million tons in 2030 and 1.4 million tons in 2035, indicating a sustained downward trend over the forecast period.

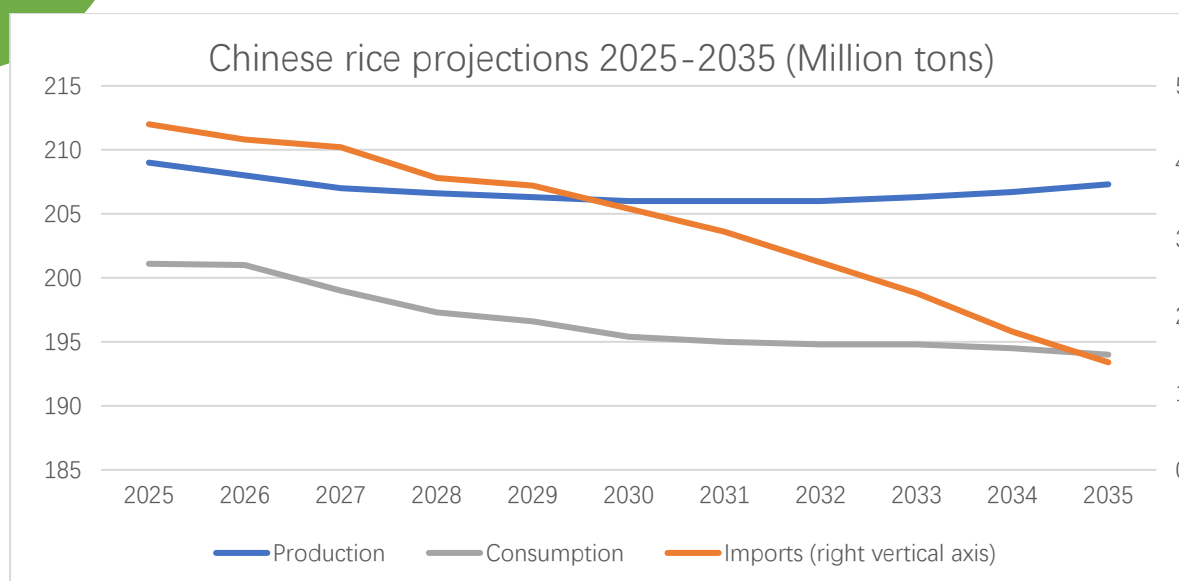


Figure 13: Rice projection for China 2026-2035 (million tons) (MARA, 2026)

4.4 Corn projections

China's corn production is projected to rise gradually, reaching 303.5 million tons in 2026, 306 million tons in 2030, and 326.7 million tons in 2035, an overall increase by 8% (Figure 14). Corn consumption is forecast to reach 319.6 million tons in 2026, 322.5 million tons in 2030, and 326.1 million tons in 2035, also indicating an overall increase. Meanwhile, corn imports are expected to decline from 7 million tons in 2026 to 4.6 million tons in 2030 and 3.6 million tons in 2035, indicating a sustained downward trend over the forecast period.

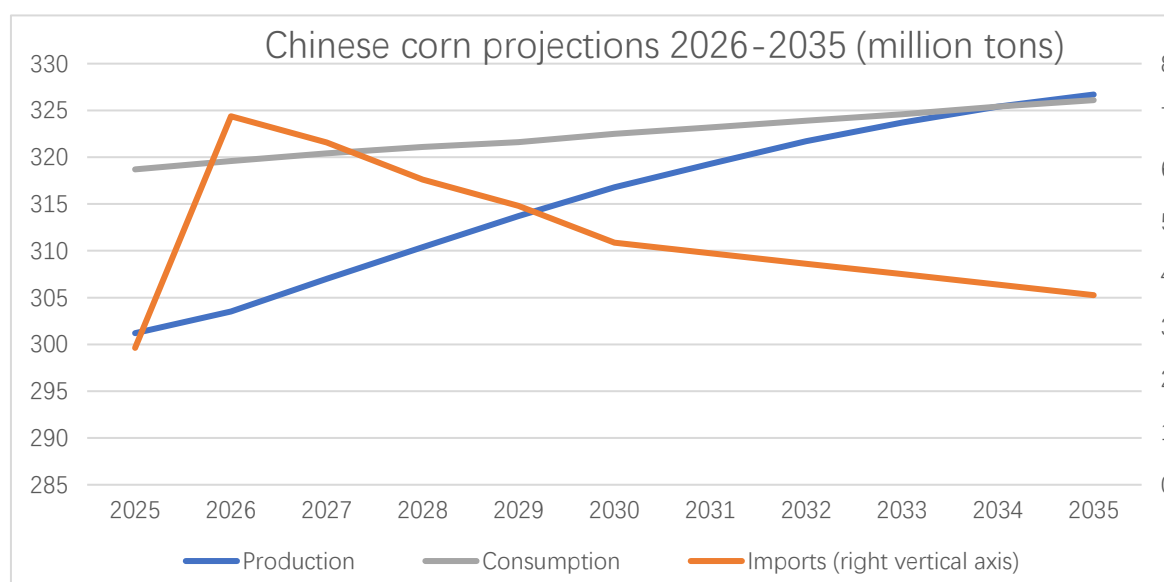


Figure 14: Corn projection for China 2026-2035 (million tons) (MARA, 2026)

4.5 Soybean projections

China's soybean production is projected to increase steadily, reaching 21 million tons in 2026, 24.7 million tons in 2030, and 32.3 million tons in 2035—an overall increase of approximately 60% from the 2025 level (Figure 15). Soybean consumption is forecast to reach 108.8 million tons in

2026 and 107.7 million tons in both 2030 and 2035, remaining broadly stable over the forecast period. Meanwhile, soybean imports are expected to decline from 111 million tons in 2025 to 105 million tons in 2026, 90 million tons in 2030, and 82.5 million tons in 2035, indicating a sustained downward trend. Nevertheless, soybeans are likely to remain China's largest imported agricultural commodity for the foreseeable future, driven primarily by strong demand for animal feed from the livestock sector. Chinese policymakers regard the country's heavy reliance on soybean imports as a strategic vulnerability within its broader food security framework. Import diversification, expansion of domestic soybean cultivation, and the substitution of soy-based feed with alternative feed ingredients have been proposed as key measures to strengthen the resilience of China's soybean supply. Extreme climate events, geopolitical and trade tensions, as well as fluctuations in global energy markets are also considered major risks to Chinese soybean resilience.

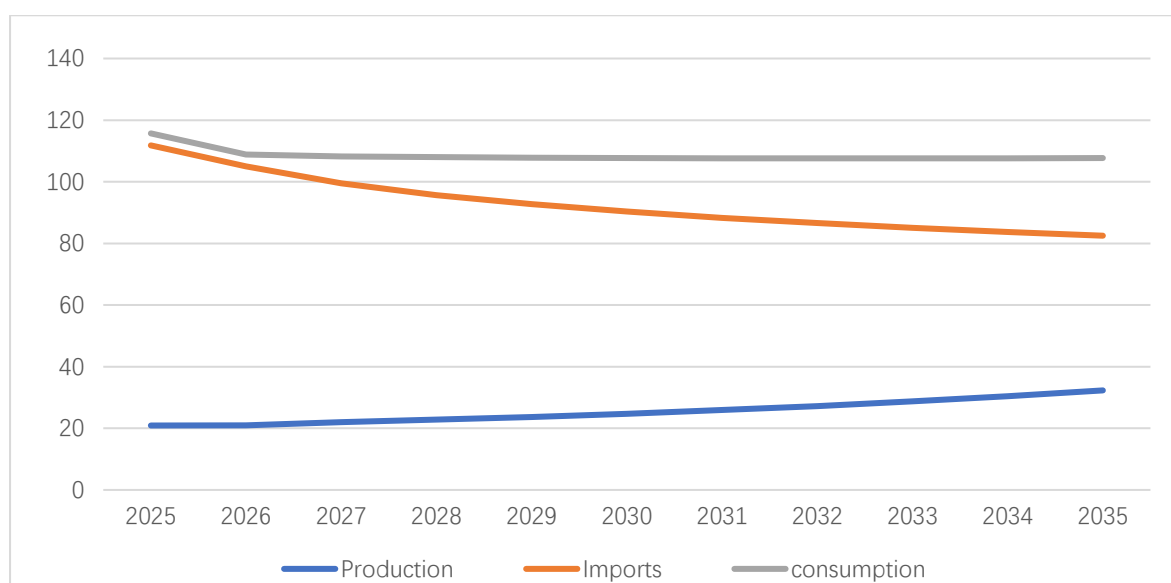


Figure 15: Soybean projection for China 2026-2035 (million tons) (MARA, 2026)

5. Projections for China's meat and dairy sector 2026-2035

5.1 Projections for overall meat sector

The Outlook projects that total meat production in China will rise to 102.1 million tons in 2026, 103.8 million tons in 2030, and 104.9 million tons in 2035 (Figure 16). Meat consumption is forecast to reach 105.3 million tons in 2026, 106.5 million tons in 2030, and 107.3 million tons in 2035, remaining broadly stable compared with the 2025 level. Meanwhile, meat imports are expected to rise from 4.8 million tons in 2026 to 5 million tons in 2030 and 5.3 million tons in 2035, remaining broadly stable compared with the 2025 level.

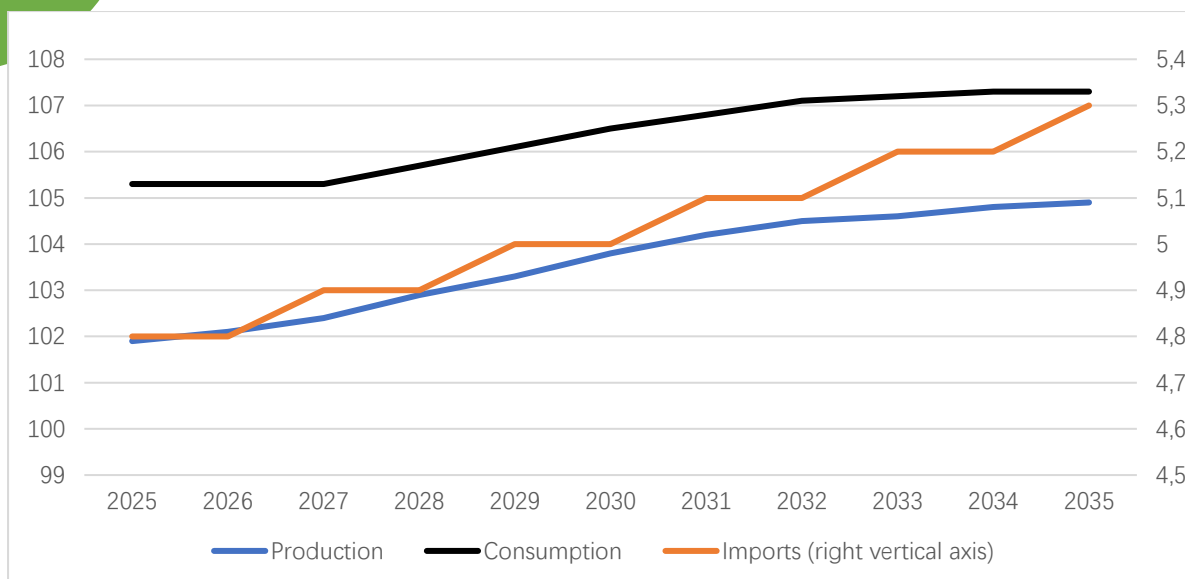


Figure 16: Projection for the overall meat sector in China 2026-2035 (million tons) (MARA, 2026)

The Outlook also highlights potential risks to meat production, such as unexpected disease outbreaks that could threaten livestock and poultry populations. These risks underscore the importance of biosecurity, sanitation, and animal welfare measures. Additionally, an aging and more affluent population may alter consumption patterns. Potential trade disputes with major partners could also affect meat and agricultural trade flows.

5.2 Projections for the pork sector

The Outlook projects that pork production in China will decline to 58.7 million tons in 2026, 57.2 million tons in 2030, and 55.1 million tons in 2035 (Figure 17). Pork consumption is forecast to decline to 59.4 million tons in 2026 from 60.2 million tons in 2025, and drop further to 57.2 million tons in 2030, and 55.3 million tons in 2035. Meanwhile, pork imports are expected to decline from 0.9 million tons in 2026 to 0.7 million tons in 2030 and 0.5 million tons in 2035. Population declines and overcapacity in the domestic pork sector will make pork imports negligible.

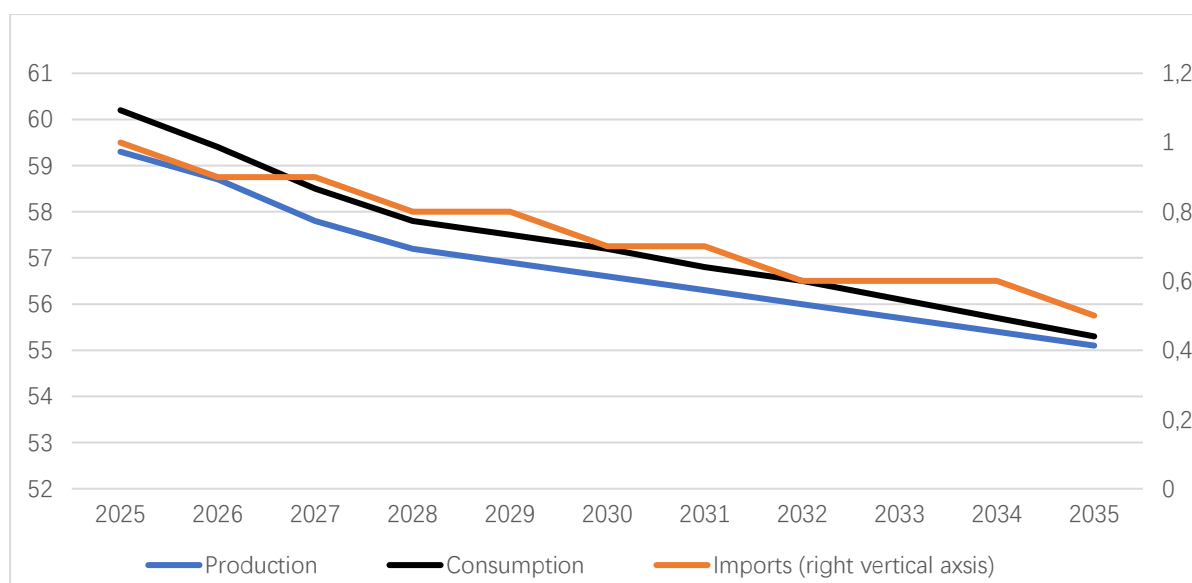


Figure 17: Projection for the pork sector in China 2026-2035 (million tons) (MARA, 2026)

5.3 Projections for the beef sector

The Outlook projects that beef production in China will reach 7.7 million tons in 2026, 7.7 million tons in 2030, and 8.2 million tons in 2035 (Figure 18). Beef consumption is forecast to reach 10.4 million tons in 2026, 10.6 million tons in 2030, and 11.3 million tons in 2035. Meanwhile, beef imports are expected to reach 2.7 million tons in 2026, 2.9 million tons in 2030, and 3.1 million tons in 2035.

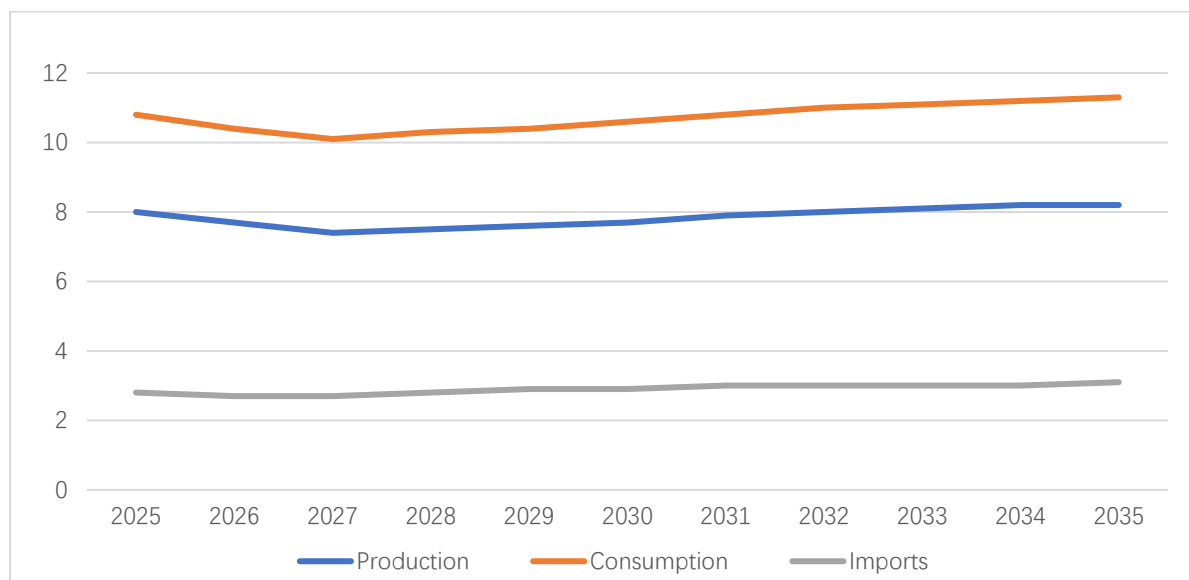


Figure 18: Projection for the beef sector in China 2026-2035 (million tons) (MARA, 2026)

5.4 Dairy sector

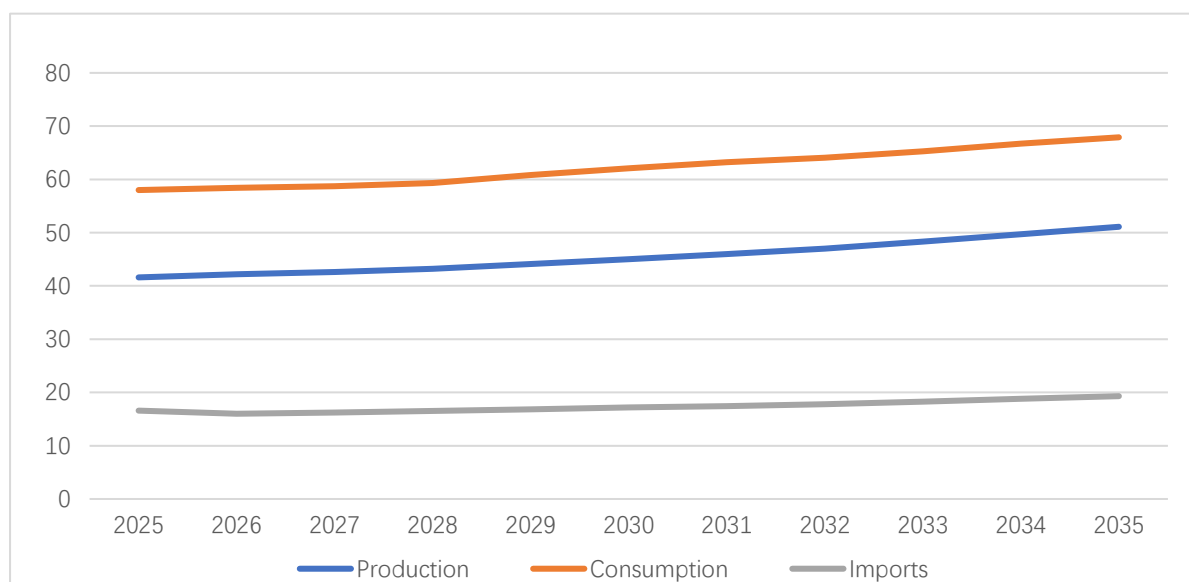


Figure 19: Projection for the milk and dairy sector in China 2026-2035 (million tons) (MARA, 2026)

The Outlook projects that milk and dairy production in China will reach 42.2 million tons in 2026, 45 million tons in 2030, and 51.1 million tons in 2035 (Figure 19). Milk and dairy consumption is forecast to reach 58.4 million tons in 2026, 62.1 million tons in 2030, and 67.9 million tons in 2035. Meanwhile, milk and dairy imports are expected to reach 16 million tons in 2026, 17.2 million

tons in 2030, and 19.3 million tons in 2035. New regulations on food safety standards, particularly for baby formula and dairy products, will enable consumers to access higher-quality products. Europe, a major dairy exporter to China, is expected to benefit from the expanding market opportunities during this period, due to its high standard dairy products. However, the recent price decline in the dairy sector, driven by domestic overcapacity, is likely to add pressure on foreign suppliers.

6. Assessment of the outlook

Overall, the projections in the Outlook appear largely positive and closely aligned with the government's focus on food security and self-sufficiency. However, past inaccuracies in CAMES projections raise some concerns. For instance, last year's forecast predicted that soybean imports would decline to 97 million tons in 2025, while the actual figure rose to a record 111.8 million tons (Table 1). Although CAMES projections for grain and meat production in 2025 closely matched reported figures, import values for soybean were significantly higher than originally predicted. This may partly reflect a tendency for official projections to underestimate future agricultural import demand, particularly for strategically important commodities such as soybeans, in line with policy objectives to reduce import dependence.

Table 1: Comparison of CAMES projections for 2025 with reported values for 2025 (million tons) (MARA, 2025, 2026)

	CAMES projections for 2025	Reported value, 2025
Grain production	709	715
Soybean production	21.1	20.9
Corn production	295	301
Meat production	98.4	101.9
Pork production	57.5	59.3
Beef production	7.3	7.5
Grain imports	138	141.9
Soybean imports	97	111.8
Corn imports	7	2.7
Meat imports	3.7	4.8
Pork imports	0.8	1
Beef imports	1.7	2.8

The greatest divergence among the long-term projections concerns agricultural trade. The OECD/FAO and USDA outlooks anticipate a more gradual decline in China's soybean imports through 2035, whereas CAMES projects a substantially sharper contraction. Specifically, CAMES expects soybean imports to fall to 82.5 million tons by 2035, compared with 98 million tons under

the OECD/FAO projection (OECD/FAO, 2026). CAMES' forecast reflects the government's goal of increasing self-sufficiency in these grains. However, achieving such inflated projections may be constrained by China's limited land and water resources, relative agricultural inefficiencies, more frequent extreme weather events, and rising meat consumption—which drives the need for more feed imports (Chu, 2024). This underlines the importance of improving data transparency to enhance the accuracy and reliability of CAMES model predictions.

China's agricultural development over the next decade will be shaped by an increasingly explicit effort to reconcile food security, technological modernization, environmental constraints, demographic change, and continued participation in global agricultural markets. The outlook indicates that China will seek to increase domestic production while reducing exposure to external supply disruptions, particularly for strategically important commodities. However, this should not be interpreted as a complete retreat from international trade. China's limited farmland, water scarcity, fragmented farm structure, soil-quality challenges, and continued demand for animal feed mean that imports will remain an essential component of national food security, at least for feed grains like soybeans.

For international agricultural exporters, the outlook implies a more differentiated Chinese market. Traditional bulk commodity suppliers may face slower import growth, stronger competition, greater regulatory scrutiny, and more frequent politically motivated trade disruptions. Pork and some feed-grain exporters appear particularly exposed because domestic overcapacity, declining population, and government efforts to increase self-sufficiency could structurally reduce import demand. Soybean imports are also projected to decline considerably, although the scale of this decline appears uncertain. Given China's persistent feed requirements and the CAMES model's previous underestimation of imports, soybeans are likely to remain a major trade flow even if China succeeds in raising domestic output.

Beef and dairy present comparatively stronger market opportunities. Chinese beef consumption is projected to grow faster than domestic production, raising import demand to approximately 3.1 million tons by 2035. Dairy consumption is also expected to expand significantly, with imports projected to reach 19.3 million tons. Nevertheless, foreign suppliers will face intense price competition from expanding and increasingly efficient domestic producers. Market access will therefore depend less on supplying undifferentiated products and more on quality, food safety, traceability, specialized nutrition, premium positioning, processing technology, and products adapted to Chinese consumer preferences.

Trade diversification will be another central feature of China's strategy. Suppliers from Belt and Road and RCEP economies may gain greater access as China seeks to reduce dependence on individual countries. However, commercially efficient producers in Brazil, Australia, the US, Europe, and other established agricultural regions will remain difficult to replace solely for geopolitical reasons. China is therefore likely to pursue a pragmatic diversification strategy that balances political reliability, price, logistics, product quality, and supply capacity.

Finally, stakeholders should treat the numerical projections with caution. The outlook reflects both economic modeling and official policy aspirations, and the sharp projected decline in imports may overstate China's ability to overcome structural resource constraints. Businesses and policymakers should therefore use the CAMES forecasts alongside alternative OECD/FAO, USDA, market, climate, and trade scenarios. Strategic planning should incorporate multiple import-

demand pathways, stronger climate-risk analysis, geopolitical stress testing, and regular revisions based on actual production, consumption, price, and trade developments.

7. External factors influencing the Outlook projections

7.1 Macroeconomic factors

GDP growth: The IMF, World Bank, and United Nations project that China's GDP growth will remain within the range of 4.4%–4.6% in 2026. By comparison, the Chinese government has set a growth target of 4.5%–5.0%, while the CAMES model projects growth of approximately 5.0% (MARA, 2026). Chinese GDP growth stood at 5% and 4.3% in the first and second quarter of 2026 (BAO & Cheng, 2026), and analysts predict that it will decelerate further without major stimulus.

Inflation and consumer price index (CPI): CAMES projects that China's consumer price inflation will remain at approximately 1% in 2026. Consumer price growth has remained subdued amid persistent deflationary pressures associated with slower economic growth, the prolonged downturn in the real estate sector, and intense price competition—often described in China as “involution (neijuan).” By contrast, the producer price index (PPI) has risen steadily since March 2026, largely reflecting higher energy and input costs linked to the conflict in Iran. In June, China's PPI reportedly reached a four-year high of 4.1% (BAO, 2026). However, the extent to which these higher producer costs will be passed to consumer prices remains uncertain.

Oil prices: CAMES projects that oil prices will average approximately USD 75.9 per barrel in 2026. However, oil prices have been highly volatile since the outbreak of the conflict in Iran. They briefly surged to around USD 120 per barrel in March before retreating, and have continued to fluctuate in response to developments in the conflict and related negotiations. China has partly shielded consumers from the most severe effects of the oil-price shock through domestic price controls, implemented largely through state-owned energy companies, and by drawing on its substantial strategic petroleum reserves (Rouzi, 2026).

Currency exchange rates: CAMES projects that the USD/RMB exchange rate will average approximately 6.9 in 2026, although it does not provide projections for other major currency pairs. Many analysts consider the Renminbi (RMB) undervalued relative to major currencies. Significant exchange-rate fluctuations could materially affect China's agricultural trade by altering import costs, export competitiveness, and the domestic prices of internationally traded agricultural commodities.

7.2 15th Five-Year Plan (5YP)

On 2 June 2026, the Chinese State Council released *Acceleration of Agricultural and Rural Modernization under the 15th Five-Year Plan*. The plan serves as China's national blueprint for agricultural and rural development during the 15th Five-Year Plan (2026–2030) (CN Gov, 2026). The strategy prioritizes rural revitalization, agricultural modernization, and integrated urban–rural development as a unified framework. It also stresses innovation-driven development, including science and technology in agriculture, green transformation, and quality-oriented growth. By 2030, China aims to significantly enhance food security capacity, stabilize grain supply foundations, and improve agricultural productivity and competitiveness, while increasing rural incomes and narrowing urban–rural gaps. According to the plan, by 2035, rural revitalization will

achieve decisive progress, and agricultural modernization will be basically completed, forming the foundation of an agricultural powerhouse or, in other words, a strong agricultural nation.

The document sets a key target of increasing grain production capacity from about 695 million tons in 2023-2024 to around 725 million tons by 2030. Meat production is expected to exceed 95 million tons, while grain and oil crop productivity will significantly improve through large-scale yield enhancement programs. The mechanization rate of major crops is targeted to reach 85%, and comprehensive grain production capacity in major regions will be further strengthened (Rouzi, 2026).

The 15th 5YP suggests that China will pursue a technology-driven, resource-efficient, and security-focused model of agricultural development. The overall direction is: raise domestic production capacity, reduce strategic vulnerabilities, upgrade rural infrastructure, industrialize agriculture, and use science, machinery, AI, seed innovation, and biotechnology to close productivity gaps. The plan moves China toward a model of “high-capacity, high-tech, green, and industrialized agriculture.”. The coming five years are likely to see accelerated modernization of farming systems, deeper integration of digital and biological technologies, and continued efforts to balance domestic food production with strategic participation in global agricultural markets, including efforts to narrow the agricultural trade deficit (Rouzi, 2026). The goals laid out in the 15th 5YP broadly support CAMES projections for 2026-2035.

7.3 Geopolitical tensions and trade restrictions

The ongoing war in Ukraine (2022–present), the ongoing US-Israeli War on Iran, and other rising geopolitical tensions have led many countries to establish trade barriers and protectionist measures against perceived unfriendly nations in the agri-food sector. This is exemplified by Russia's naval blockade of Ukrainian grain transports in 2022 and its export restrictions on fertilizers during 2022-2023 (Rouzi, 2023). The 2026 Iran war brought the closure of the Strait of Hormuz – a crucial passageway for global energy and fertilizer shipments, which are key ingredients for agriculture production. As a result, fertilizers and food prices have risen globally. As of April 2026, nitrogen fertilizer prices jumped to around USD 700 per metric ton, up from USD 400 before the war began (CNBC, 2026). Recent Chinese policy documents and key speeches linking food security to national security suggest that the Chinese government prioritizes food self-sufficiency and security, particularly in a turbulent geopolitical environment (Dong et al., 2024).

Renewed trade tensions between China and the United States under the second Trump administration in 2025 placed US agricultural exports squarely in the crosshairs of Chinese retaliation. As a result, US agricultural exports to China reportedly fell by 62%, to USD 16.1 billion in 2025 (CCCFNA, 2026). Although China pledged to resume more agricultural purchases from the US following President Trump's visit in Beijing in May 2026 (Politico, 2026), the implementation of these commitments will largely depend on developments in the broader bilateral relationship.

In response to the EU's higher tariffs on Chinese electric vehicles, China imposed tariffs of 62.4% on EU pork in September 2025 (Pandy, 2026), followed by tariffs of 42% on EU dairy products in December 2025 (AP, 2026). Although China lowered dairy tariffs on EU in February 2026 to between 7.4% and 11.7% (Reuters, 2026), continued EU concerns over Chinese industrial imports

are likely to sustain bilateral trade tensions, leaving European agricultural exports particularly exposed to further retaliatory measures as was the case with US agricultural exports.

7.4 Demographics

In 2025, China recorded its fourth consecutive year of population decline, with the largest annual decrease of 3.39 million, bringing the total down to 1.404 billion (Sun, 2026). Projections suggest that the Chinese population could be halved by the end of the 21st century (Rieffel & Wang, 2024). This demographic trend may lead to reduced demand for agricultural products, thereby easing pressure on food production (Hughes & Edwards, 2024). It could also reshape global food trade patterns, prompting international agri-food suppliers reliant on the Chinese market to seek alternative buyers (Rouzi, 2024). Additionally, demographic decline may result in depopulation in rural areas and a shrinking farm labor force, potentially hindering food self-sufficiency goals (Yang et al., 2024). However, some experts suggest that technological advancements and efficiency improvements could help mitigate these challenges.

7.5 Climate events

Climate change was not explicitly factored into the CAMES projections. China is particularly vulnerable to further climate-related changes, which pose a significant risk to its food security. Some studies carried out by scientists from Peking University that used the China Agricultural Policy Simulation Model (CAPSiM) showed the rice, wheat, corn, and oil seeds production would decline by 2030 under the Representative Concentration Pathway (RCP) 2.6 and RCP 8.5 climate scenarios (Cui et al., 2022). Chinese scientists warn that these changes will disproportionately affect the country's grain-producing northeastern provinces, advocating for stringent black soil protection regulations and nature-based solutions to safeguard food supplies (Chan et al., 2024).

On 11 June 2026, the US National Oceanic and Atmospheric Administration (NOAA) reported a 63% probability that a very strong El Niño would develop between November 2026 and January 2027, with sea-surface temperatures in the monitored regions reaching at least 2°C above normal. Such a strong El Niño could significantly disrupt global weather patterns, increasing the likelihood of excessive rainfall and flooding in some regions and drought and extreme heat in others during 2026–2027 (Guardian, 2026). Previous super El Niño events—including those in 1997–1998, 2015–2016, and 2023–2024—caused substantial crop losses and reduced grain yields in affected regions, particularly Southeast Asia, India, and Latin America (Blooming, 2026). Analysts estimate that a potential super El Niño could not only cause extreme weather and reduce crop yields within China, but also disrupt agricultural production in Latin America, Australia, and Southeast Asia—major suppliers of commodities on which China depends. Such simultaneous domestic and external supply shocks could increase China's exposure to food-security pressures and food-price inflation.

8. Implication of the Outlook

8.1 Food security

In addition to China's 15th 5YP, the Outlook projections also align broadly with the goals of the country's 2024 food security law, reinforcing China's focus on self-sufficiency and agricultural resilience. According to government documents, China aims to achieve 92% self-sufficiency in

staple grains and beans by 2033, up from 84% during the 2021–2023 period (Chu, 2024). Although China has successfully met self-imposed targets and deadlines in the past, achieving the projected level of self-sufficiency could be hindered by climate-induced weather events, declining soil fertility, and demographic challenges.

8.2 Trade

Since China joined the World Trade Organization (WTO) in 2001, the country's agri-food imports have surged dramatically, rising from just USD 11 billion in 2001 to USD 207 billion in 2025, making China the world's largest agri-food importer, as shown in Figure 20. Notably, China's agricultural imports have declined moderately since reaching their peak in 2022. In contrast, agri-food exports have grown at a slower pace, reaching USD 104 billion in 2025, with the majority of food production being directed to the domestic market.

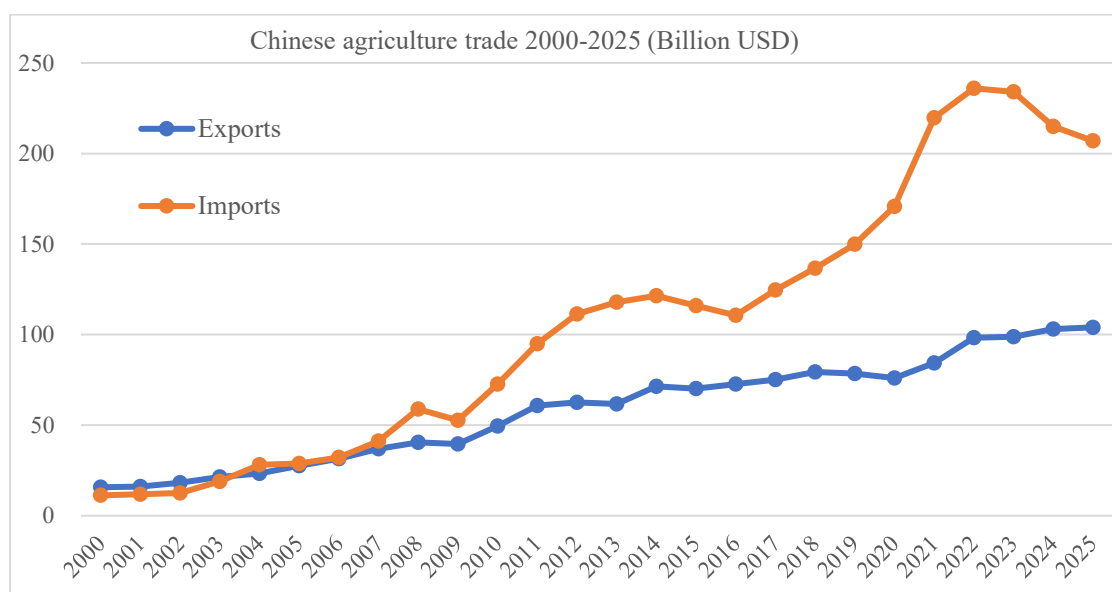


Figure 20: Chinese agri-food trade 2000-2025 (billion USD) (NBS, 2025)

Brazil, the US, Australia, Thailand, and the EU were the largest source of agricultural imports into China in 2025, while, the US, Japan, Hong Kong, South Korea, and the EU were the largest export destinations for Chinese agricultural products (see Figure 21).

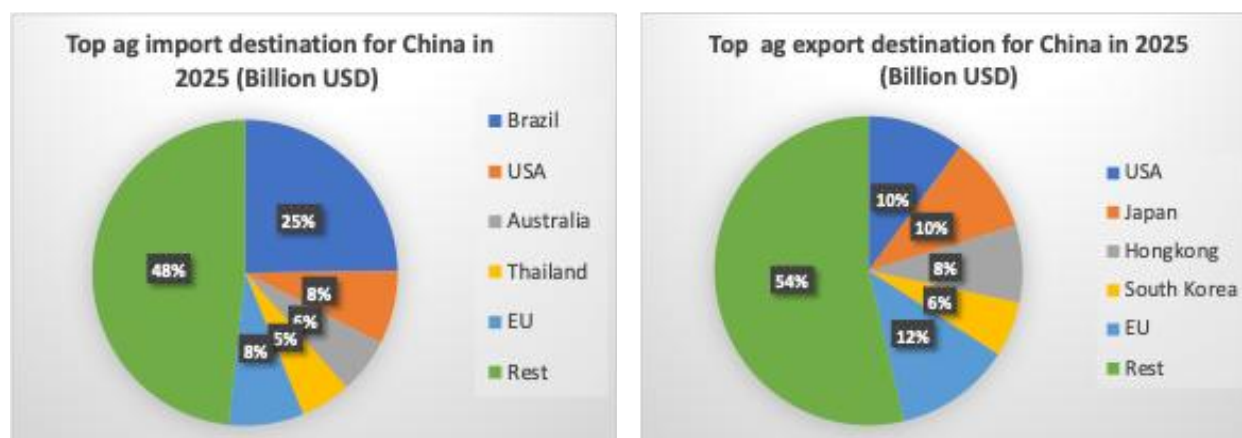


Figure 21: Top Chinese agricultural trade partners in 2025 (CCCFNA, 2026)

As discussed earlier, the outlook's projection of declining agricultural imports into China has significant implications for trade. The accuracy of CAMES' predictions will be tested by real-world conditions, particularly the pace of economic growth, currency fluctuations, and the impact of global supply chain disruptions. In terms of agricultural trade, China is expected to maintain a pragmatic approach. Structural constraints, particularly limited land and water resources, mean that imports of land-intensive commodities such as soybeans and feed grains will likely remain significant. However, the policy emphasis on supply security and import diversification suggests that China will continue to diversify import sources and strengthen domestic production where feasible. This may lead to a more strategically managed import structure, balancing food security considerations with international market integration to further narrow the gap between imports and exports, as shown in Figure 20. Belt and Road Initiative countries and members of the RCEP could benefit from China's efforts to diversify its imports. However, agriculture in these regions, with the exception of Australia and New Zealand, remains relatively inefficient and more costly compared to agriculturally advanced countries in the Americas and Europe.

8.3 Science and technology advancements

In addition to limited land and water resources, small per capita farm sizes constrain China's ability to produce enough food to meet the needs of its population (Rouzi, 2023). Policymakers have focused on advancements in seeds, biotechnology, enhanced breeding, digitalization, mechanization, and improved irrigation and fertilization techniques to boost yields. As discussed in the previous chapter, China's newly released 15th Five-Year Plan (2026-2030) made science and technology the pillar of agriculture through 1) building a comprehensive agricultural science and innovation system, 2) strengthening commercial breeding and seed companies, 3) promoting precision and digital agriculture, and 4) integrating technology through the concept of "good land, good seeds, good machinery, and good farming practices." The focus has shifted from mechanization alone in the 14th 5YP toward a comprehensive technological transformation of agriculture in the 15th 5YP, linked to China's broader strategy of developing "new quality productive forces." (Rouzi, 2026)

However, China's aging rural population, with limited education and technical skills, presents challenges to these efforts. Additionally, an overemphasis on science and technology could overshadow existing environmentally friendly farming practices in smallholder farms, potentially leading to new issues such as environmental degradation and social dislocation.

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