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Report Highlights:

Post forecasts stable pork production in 2026 and reduced pork imports due to abundant domestic supplies. Post anticipates lower beef production and slightly higher imports to meet demand in price-sensitive segments. Retaliatory tariffs and unresolved facility registration issues continue to limit U.S. meat access to the Chinese market.

EXECUTIVE SUMMARY

FAS China provides this analysis and reporting as a service to the U.S. agricultural community, and to our farmers, ranchers, rural communities, and agribusiness operations in support of a worldwide agricultural information system and a level playing field for U.S. agriculture.

Cattle Production: Post forecasts beef cattle production in 2026 to decline due to a smaller breeding cow inventory and persistently low calving efficiency. Many farms reduced breeding stock in 2024, and herd rebuilding has been slow despite a modest price recovery and continued government support.

Cattle Imports: Post forecasts cattle imports in 2026 to remain low, in line with 2025 levels. Beef cattle imports are expected to stay minimal, while dairy cattle imports will be constrained by weak milk prices, high costs, and reliance on in-house breeding systems among large operations.

Beef Production: Post forecasts beef production in 2026 to decline modestly due to a reduced supply of slaughter-ready cattle. Post revised its 2025 production estimate to flat year-over-year, as early-year slaughter volumes offset expected declines in the second half.

Beef Imports: Post forecasts beef imports in 2026 to increase slightly due to lower domestic production. Imports of frozen beef will help meet demand in lower-priced market segments. However, overall growth will be limited by economic pressure and continued weakness in foodservice and household demand.

Swine Production: Post forecasts swine production in 2026 to remain stable, with average 2025 sow inventory expected to hold steady compared to 2024. Early-year herd expansion has given way to slower replenishment in the second half as prices declined and margins tightened.

Swine Imports: Post revised its 2025 swine import estimate downward due to trade uncertainty, and limited quarantine capacity. A moderate rebound is forecast for 2026, supported by ongoing demand for high-quality genetics and fulfillment of delayed contracts.

Pork Production: Post forecasts pork production in 2026 to hold steady, with stable piglet output supporting supply while lower carcass weights and flat demand constrain further gains. Post revised its 2025 pork production estimate upward based on official first-half data and improved productivity, though falling prices may limit output growth in the second half.

Pork Imports: Post forecasts pork imports in 2026 to decline modestly on weaker demand and ample domestic supply. Traders are cautious amid slower market movement and high cold storage inventories.

CATTLE

Table 1. China: Cattle Production, Supply, and Distribution

Animal Numbers, Cattle Market Year Begins	2024		2025		2026	
	Jan 2024		Jan 2025		Jan 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
China						
Total Cattle Beg. Stks (1000 HEAD)	105,090	105,090	104,900	100,470	0	94,080
Dairy Cows Beg. Stocks (1000 HEAD)	14,000	14,000	13,000	13,000	0	12,500
Beef Cows Beg. Stocks (1000 HEAD)	57,500	50,000	56,000	49,000	0	47,000
Production (Calf Crop) (1000 HEAD)	52,000	47,500	50,000	45,600	0	44,000
Total Imports (1000 HEAD)	56	56	60	40	0	40
Total Supply (1000 HEAD)	157,146	152,646	154,960	146,110	0	138,120
Total Exports (1000 HEAD)	11	11	11	11	0	11
Cow Slaughter (1000 HEAD)	0	0	0	0	0	0
Calf Slaughter (1000 HEAD)	0	0	0	0	0	0
Other Slaughter (1000 HEAD)	50,990	50,990	50,750	51,000	0	49,500
Total Slaughter (1000 HEAD)	50,990	50,990	50,750	51,000	0	49,500
Loss and Residual (1000 HEAD)	1,245	1,175	1,049	1,019	0	1,049
Ending Inventories (1000 HEAD)	104,900	100,470	103,150	94,080	0	87,560
Total Distribution (1000 HEAD)	157,146	152,646	154,960	146,110	0	138,120

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Note: Not Official USDA Data

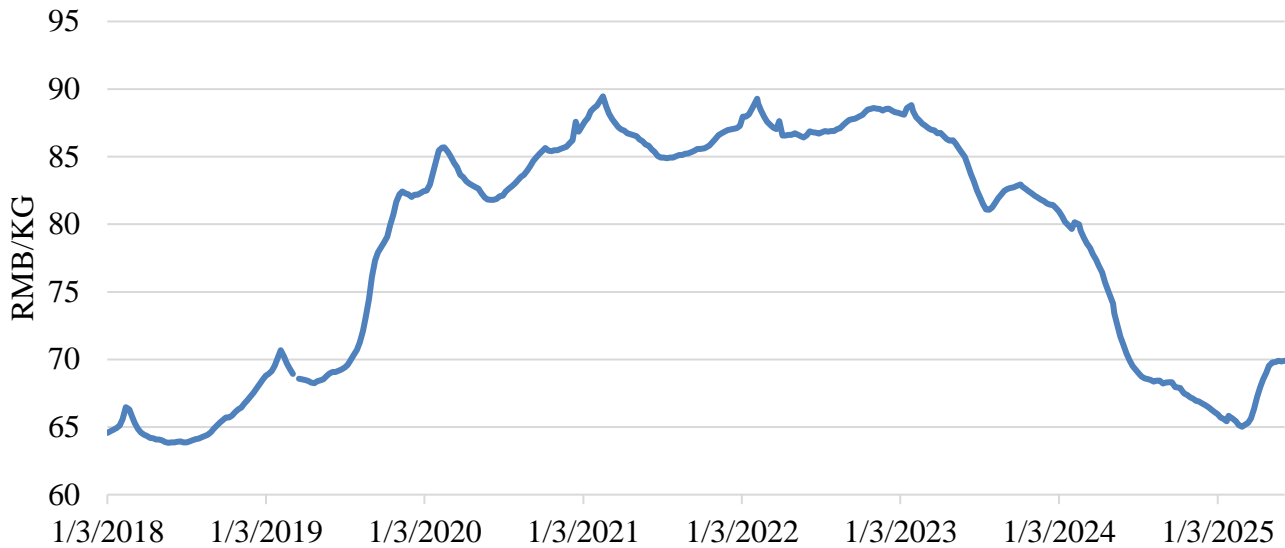
PRODUCTION

Cattle Production to Decline

Post forecasts a decline in China’s beef cattle production in 2026, primarily due to a smaller breeding cow inventory and persistently low calving efficiency. Industry sources report that many farms reduced their breeding stock in 2024 amid prolonged losses caused by low cattle prices. These prolonged low prices, combined with widespread exits from the sector, resulted in a significant reduction in the breeding stock in 2024, a shift that continues to shape the herd structure and limit production potential through 2026. While some operations exited the industry entirely, most of the remaining producers are still small- to mid-sized farms that face structural limitations in improving reproductive performance. Post observed little improvement in early 2025. As a result, national calving efficiency rates are likely to remain low in 2026.

The Chinese Government continues its long-standing policy support for the beef sector in 2025, including feed subsidies, improved access to credit, and subsidies for farms that retain breeding cows following successful calving. Sources indicate prices for live cattle and beef began to recover in early 2025 (see Chart 1), likely due to tighter market supply following the sharp herd reduction in 2024. A price rebound, combined with government support, could slow the pace of herd contraction.

Chart 1. China: National Average Beef Price



Source: MARA

Ending Inventories in 2026 to Continue Declining

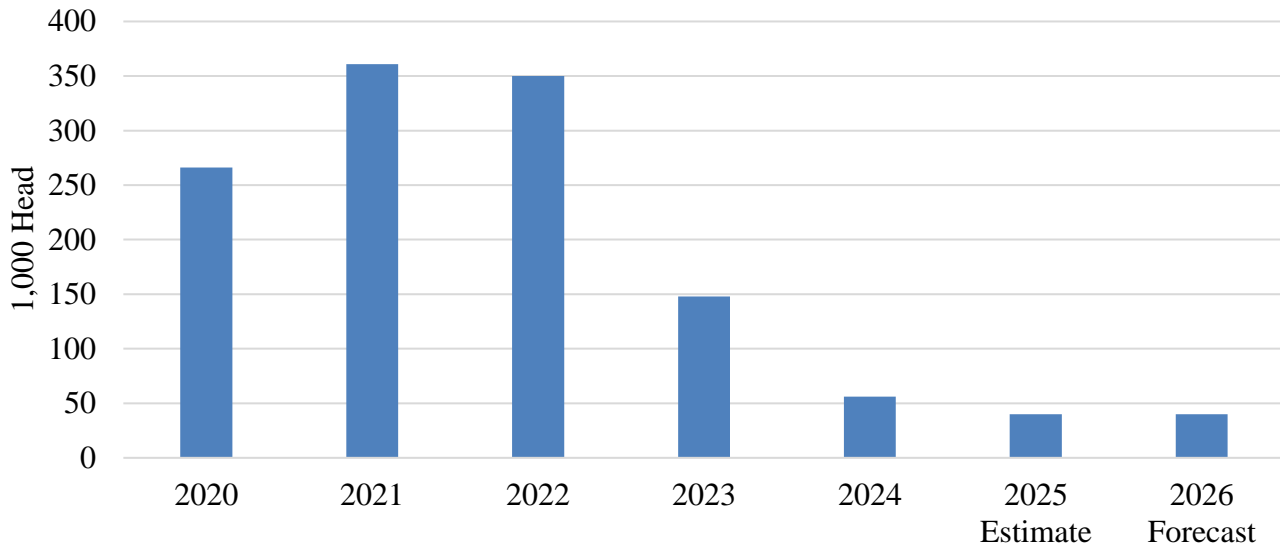
Post forecasts 2026 ending cattle inventories to continue declining, driven primarily by persistently low calf births. The reduction in breeding cows in 2024 and 2025, combined with a slow replenishment of replacement heifers, has limited the number of calves entering the production cycle and constrained overall herd recovery. Slaughter volumes have also stayed relatively high, with earlier cattle marketing accelerating herd drawdowns. Limited live cattle imports provided little offset to these trends. As a result, total cattle inventories are expected to continue trending downward through 2026.

TRADE

Cattle Imports in 2026 to Remain Low

Post forecasts that China's live cattle imports in 2026 will remain low, roughly in line with 2025 levels (see Chart 2), with the majority being dairy cattle. Imports will primarily support herd renewal and a limited number of project-based introductions. Imported dairy cattle are mainly used to replenish breeding herds in large-scale operations, bridge genetic gaps in newly built facilities, and serve as alternatives to frozen semen and embryo technologies—particularly considering the suspension of U.S. embryo export licenses in early 2025. Industry sources indicate Australia regained access for frozen semen and embryos in 2025.

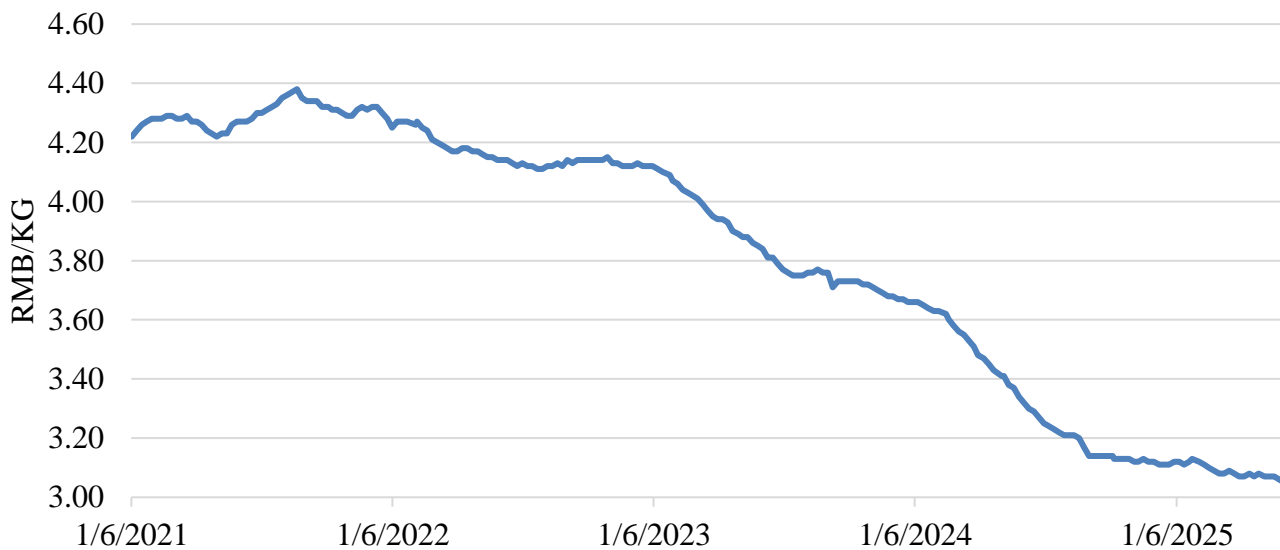
Chart 2. China: Live Cattle Imports



Source: Trade Data Monitor, LLC and Post Forecast

Milk prices remained weak throughout the first half of 2025 (see Chart 3), according to MARA data. Even if prices improve modestly in 2026, they are unlikely to reach levels that would justify large-scale herd expansion or significant capital investment in imported breeding stock. Producers remain cautious about introducing high-cost animals under uncertain market conditions. Some leading dairy enterprises have established stable in-house breeding programs and have become less dependent on imports. These companies increasingly rely on embryo transfer and domestic replacements to maintain genetic diversity within their herds rather than expanding herd size through foreign sources.

Chart 3. China: National Average Milk Price



Source: MARA

Beef cattle imports will continue to represent a minor share of total live cattle shipments. Beef cattle imports in 2026 are expected to remain minimal, as market prices remain low to support substantial import demand.

Cattle Imports in 2025 to Decline Sharply

Post revised its forecast for China’s live cattle imports in 2025 to reflect a year-over-year decline, reversing earlier expectations of modest growth. The adjustment is based on significantly lower import volumes in the first five months of the year and continued industry caution toward expansion. From January to May 2025, China imported just 14,000 head of live cattle, down over 65 percent compared to the same period in 2024. Australia remained the sole supplier. The sharp drop in trade suggests that full-year imports will fall below 2024 levels, even if volumes increase slightly in the second half.

China’s cattle sector remains cautious to new investments and expansions following herd reductions in 2024. Investment decisions are restrained, and live cattle imports—primarily dairy cattle—are concentrated in small-scale, project-specific purchases. New import activity in 2025 is largely focused on maintaining genetic diversity rather than expanding herd size.

BEEF

Table 2. China: Beef Production, Supply, and Distribution

Meat, Beef and Veal Market Year Begins	2024		2025		2026	
	Jan 2024		Jan 2025		Jan 2026	
China	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference) (1000 HEAD)	50,990	50,990	50,750	51,000	0	49,500
Beginning Stocks (1000 MT CWE)	0	0	0	0	0	0
Production (1000 MT CWE)	7,790	7,790	7,740	7,790	0	7,560
Total Imports (1000 MT CWE)	3,743	3,743	3,825	3,400	0	3,500
Total Supply (1000 MT CWE)	11,533	11,533	11,565	11,190	0	11,060
Total Exports (1000 MT CWE)	18	18	18	19	0	19
Human Dom. Consumption (1000 MT CWE)	11,515	11,515	11,547	11,171	0	11,041
Other Use, Losses (1000 MT CWE)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT CWE)	11,515	11,515	11,547	11,171	0	11,041
Ending Stocks (1000 MT CWE)	0	0	0	0	0	0
Total Distribution (1000 MT CWE)	11,533	11,533	11,565	11,190	0	11,060

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Note: Not Official USDA Data

PRODUCTION

Beef Production in 2026 to Decline

Post forecasts that China's beef production in 2026 will decline, primarily due to reduced supplies of slaughter-ready beef cattle. The contraction follows lower calf births in previous years, which resulted from a sharp decline in the national breeding cow inventory in 2024. With fewer cattle available for slaughter, beef output is likely to fall below the 2025 level.

Domestic beef consumption remains weak and shows no clear signs of recovery. Without stronger demand, producers are unlikely to increase slaughter volumes, and market conditions will not support production growth. Carcass weights will likely remain stable. Although gradual improvements in feeding and finishing practices may slightly raise slaughter weights, the reduction in cattle supplies will outweigh those gains.

Beef Production in 2025 Revised to Remain Flat Year-on-Year

Post adjusted its estimate for China's 2025 beef production to reflect stable output compared to 2024. The revision is supported by official production data for the first half of the year and evidence of front-loaded slaughter activity following industry contraction in 2024. According to China's National Bureau of Statistics (NBS), beef production in the first half of 2025 increased by approximately 4.5 percent year-on-year. Sources indicate this growth was primarily driven by concentrated slaughter activity in the early part of the year, as farms responded to prior-year losses by accelerating herd liquidation. Industry sources confirm that a wave of exits and herd reductions in 2024 led to an influx of market-ready cattle, which helped maintain high slaughter volumes into early 2025. However, slaughter rates in the second half of the year could moderate. Live cattle prices have shown signs of recovery since Q2 2025, which may reduce the urgency for further liquidation. As a result, total annual slaughter volumes in 2025 could level off, offsetting the earlier gains.

CONSUMPTION

Beef Consumption in 2026 May Decline

Post forecasts that China's beef consumption will continue declining in 2026, reflecting persistent pressure on household incomes and continued weakness in consumer confidence. Although the Chinese Government claimed that GDP grew by 5.3 percent in the first half of 2025, international institutions—including the IMF and World Bank—project that full-year growth in 2026 will slow to around 4 percent. The anticipated deceleration in economic activity suggests limited momentum for consumption recovery, particularly among lower- and middle-income households. Under such conditions, consumers are likely to prioritize value and curb discretionary spending, especially on premium proteins such as beef.

Industry contacts report that foodservice sales in some cities declined by 30 to 50 percent in 2025, a sharp contraction that underscores the fragility of consumer demand. Considering that such declines occurred in a year when GDP still expanded by over five percent, a slower growth environment in 2026 is unlikely to support a rebound in beef consumption. Beef remains the most expensive major animal

protein in China, with average prices well above pork and poultry. In 2026, the price gap will continue to suppress demand in lower-tier cities and households, where consumers are likely to opt for more affordable alternatives. Foodservice channels, such as hotpot, ready-to-cook meals, and group catering, could maintain a stable demand for lower-priced beef cuts but are insufficient to offset broader declines in household and high-end consumption.

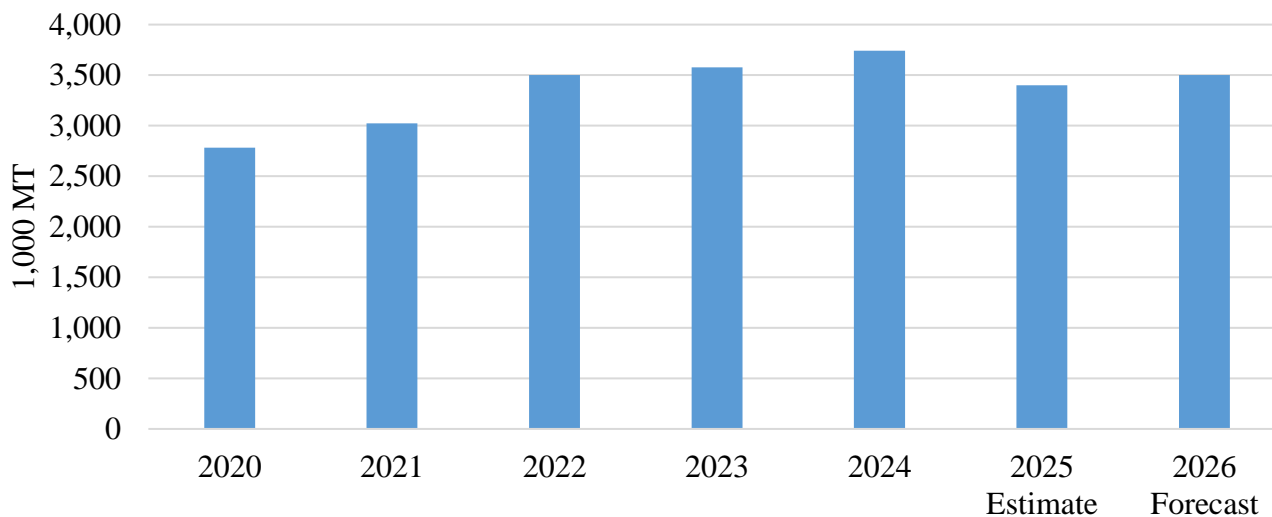
In May 2025, China’s General Office of the Communist Party Central Committee and the State Council jointly issued the “Action Plan on Food Conservation and Anti-Food Waste,” which introduced stricter rules on official dining standards. The regulations strictly limit excessive hospitality and reinforce the longstanding ban on extravagance. This policy signals a further tightening of government oversight on public-sector dining practices. This is not the first such initiative. As early as 2012, the central government introduced the “Eight-Point Regulation,” which laid the foundation for China’s long-term campaign against wasteful government spending. The 2025 regulation represents a continuation and intensification of this policy framework. These measures will potentially apply to tens of millions of local and central government officials and state-owned enterprise (SOE) employees and may exert some influence on high-end foodservice channels, particularly those involving beef in government banquets and premium dining venues. Furthermore, private companies often wine and dine government or SOE officials in high end restaurants. Local governments in China have reportedly published blacklists of high-cost HRI establishments, including many western restaurants, where government officials are prohibited from dining if the average cost per person exceeds 400 RMB (\$56).

TRADE

Beef Imports in 2026 May Rise Slightly

Post forecasts China’s beef imports to be slightly higher in 2026 due to reduced domestic production, with frozen beef from Brazil and South America offsetting shortages in cost-sensitive segments like hotpot and catering (see Chart 4). However, sluggish demand and weaker household consumption will limit overall import growth, with imports filling structural gaps rather than driving market expansion.

Chart 4. China: Beef Imports



Source: Trade Data Monitor, LLC and Post Forecast

Brazil will likely remain China's top beef supplier, offering competitively priced products well-suited to mass-market applications. However, imports of premium products are unlikely to rebound. U.S. beef exports to China are unlikely to return to previous levels in 2026 due to unresolved establishment registration issues, as China has allowed several hundred U.S. beef establishment registrations to lapse (see Policy section) and imposed retaliatory tariffs, severely limiting high-value chilled and frozen U.S. beef shipments. High costs and limited downstream demand also constrain imports from other premium suppliers.

Safeguard Investigation on Beef Imports Continues

In December 2024, China's Ministry of Commerce (MOFCOM) launched a safeguard investigation into beef imports following a petition from the China Animal Agriculture Association and nine provincial livestock associations. The investigation covers fresh, chilled, and frozen beef products under specific HS codes. On August 6, 2025, MOFCOM issued Public Notice No. 38 announcing that, due to the complexity of the case, the investigation has been extended until November 26, 2025. As the investigation remains ongoing with no final determination or safeguard measure announced, the forecasts presented in this report do not factor in any potential impact from the safeguard case.

2025 Imports Revised Down

Post revised its 2025 beef import estimate lower due to weaker-than-expected consumer demand. Economic pressure and reduced household spending curbed beef consumption across both retail and foodservice sectors. From January to May 2025, China's beef imports dropped more than ten percent year-over-year. Even with a potential pickup later in the year, full-year shipments are unlikely to reach 2024 levels. Trade restrictions on U.S. beef also weighed on overall import demand, though to a lesser extent.

SWINE

Table 3. China: Swine Production, Supply, and Distribution

Animal Numbers, Swine Market Year Begins	2024		2025		2026	
	Jan 2024		Jan 2025		Jan 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
China						
Total Beginning Stocks (1000 HEAD)	434,220	434,220	427,430	427,430	0	425,000
Sow Beginning Stocks (1000 HEAD)	41,420	41,420	40,780	40,780	0	40,200
Production (Pig Crop) (1000 HEAD)	704,970	704,970	705,000	709,500	0	709,500
Total Imports (1000 HEAD)	4	4	4	3	0	4
Total Supply (1000 HEAD)	1,139,194	1,139,194	1,132,434	1,136,933	0	1,134,504
Total Exports (1000 HEAD)	1,149	1,149	1,200	1,160	0	1,170
Sow Slaughter (1000 HEAD)	0	0	0	0	0	0
Other Slaughter (1000 HEAD)	702,560	702,560	701,000	703,000	0	703,800
Total Slaughter (1000 HEAD)	702,560	702,560	701,000	703,000	0	703,800
Loss and Residual (1000 HEAD)	8,055	8,055	7,734	7,773	0	8,034
Ending Inventories (1000 HEAD)	427,430	427,430	422,500	425,000	0	421,500
Total Distribution (1000 HEAD)	1,139,194	1,139,194	1,132,434	1,136,933	0	1,134,504

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Note: Not Official USDA Data

PRODUCTION

Swine Production in 2026 to Remain Stable

Post forecasts that swine production in China will remain stable in 2026. Although sow inventories during the first four months of 2025 were higher than the same period in 2024, expectations of weaker hog prices in the second half of the year may squeeze producer margins, accelerating the exit of smallholders and discouraging sow replenishment. Post estimates that the average sow inventory for 2025 will remain roughly unchanged year-over-year, laying the foundation for stable swine production in 2026.

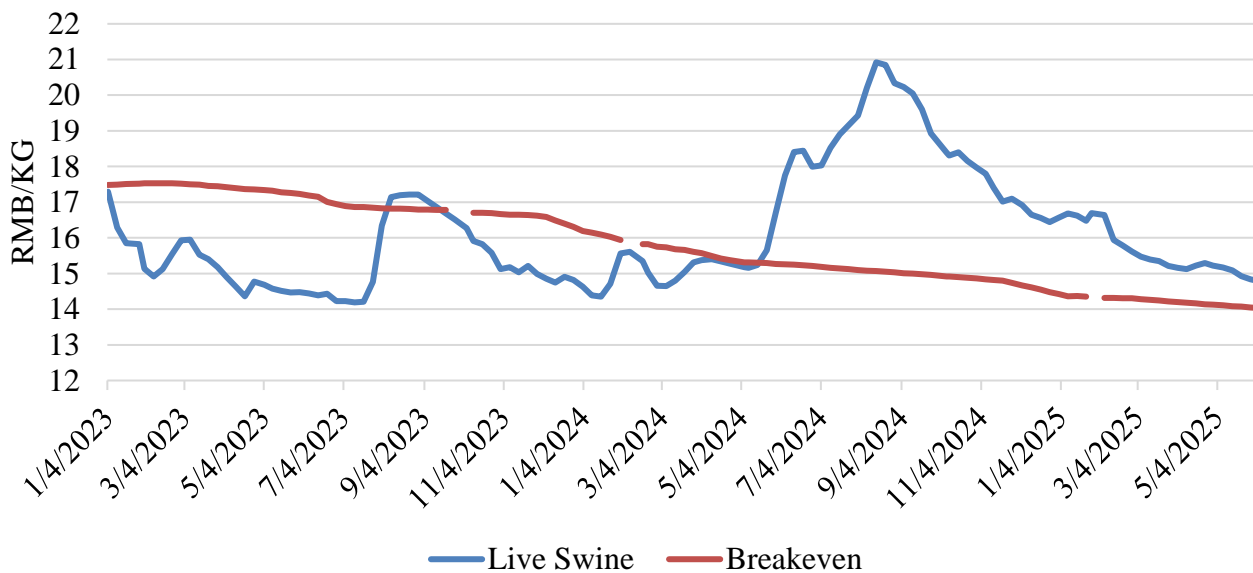
Sow Inventory in Early 2025 Elevated but Expected to Decline in the Second Half

According to data from NBS, China's breeding sow inventory totaled 40.43 million head by the end of June 2025, marking a year-over-year increase of 60,000 head or 0.1 percent. Although this level falls within the "green zone" defined by China's national hog capacity control policy, the total breeding sow

inventory is getting close to the upper limit of the “green zone” at 103.7 percent of the official baseline inventory target.¹

The elevated sow numbers were driven by profitability in piglet production, new farm startups, and higher utilization rates at commercial-scale operations. However, live hog prices have been trending downward since late 2024 (see Chart 5). Entering the summer months, continued price weakness, hot weather, and sluggish seasonal demand are expected to dampen incentives to retain sows. Industry sources report that by late June, swine prices in some southern provinces fell below the estimated breakeven level, further weakening replenishment motivation. Post anticipates that the second half of 2025 will mark the peak of slaughter activity for the year, with volumes surpassing those in the first half. This added pressure on prices may lead producers to reduce breeding herd sizes. (For more detail, see the Pork Production section on 2025 slaughter trends.) While sow inventory remained high in the early part of the year, sow replenishment is expected to slow in the second half of 2025.

Chart 5. China: National Average Live Swine Price



Source: MARA and industry sources.

Note: “Breakeven”² refers to estimated cost of farrow-to-finish

Despite sustained profitability through April 2025, marking twelve consecutive months of positive margins for most producers, profits began to erode in late 2024 and continued to deteriorate in 2025. By June, sources indicate that farms reliant on purchased piglets had fallen to negative margins. Tightening margins have accelerated the exit of small- and medium-sized producers. While large-scale farms remain profitable, many have shifted their investment focus toward technology upgrades rather than herd expansion. In 2024, two of the largest swine producers in China reportedly allocated significant portions of their profits to developing intelligent based farming systems and smart production

¹ In 2024, China’s Ministry of Agriculture and Rural Affairs revised the national swine capacity control policy, lowering the baseline for normal breeding sow inventory from 41 million to 39 million head, with the “green zone” defined as 92 to 105 percent of this target.

² Statistics of “breakeven” are from industry sources.

infrastructure. Even though some companies reported over 300 percent year-over-year profit growth in Q1 2025, expansion efforts have become more restrained.

Sources indicate environmental enforcement intensified in 2025, with numerous producers penalized for violations related to waste management. Small farms lacking adequate facilities or environmental compliance awareness have been the primary targets of these measures and have been forced out of the market. In contrast, large-scale farms with better compliance systems, operational efficiency, and financial strength have been able to sustain or expand their operations. At the same time, regional specialization has become more evident. In the north, many producers are shifting toward commercial finishing operations, while farms in the south continue to focus on breeding and piglet production. Productivity across large-scale farms continues to improve.

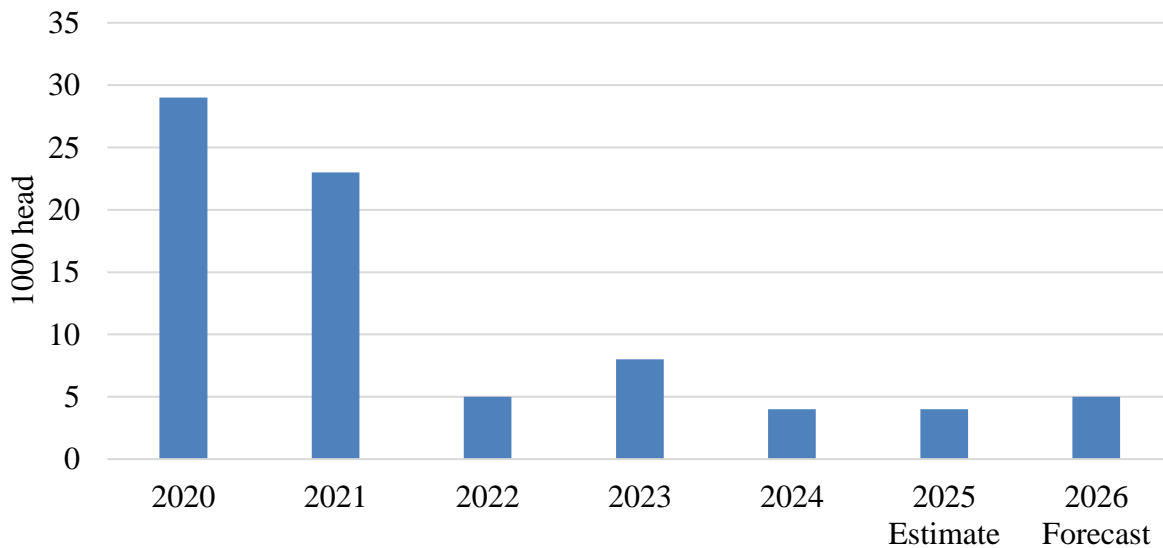
TRADE

Swine Imports

2026 Breeding Swine Imports to Rebound Moderately

Post forecasts a moderate year-on-year increase in breeding swine imports in 2026, following a lower base in 2025 (see Chart 6). Large-scale swine producers continue to prioritize genetic improvement as part of efforts to raise pigs per sow per year (PSY), driving persistent demand for high-quality breeding stock. As China’s domestic core breeding system remains under development, imports will continue to play a critical role in herd genetic renewal.

Chart 6. China: Live Swine Imports



Source: Trade Data Monitor, LLC and Post Forecast

Additionally, some orders originally contracted in 2025 are delayed due to quarantine bottlenecks or trade-related uncertainties and could be fulfilled in 2026. Industry sources have indicated that U.S. breeding swine remain competitive with limited tariffs but are concerned about an inconsistent trading environment that could lead to delayed or canceled shipments. Meanwhile, non-U.S. suppliers such as

Denmark have already increased shipments in 2025, and their role in China's breeding swine supply is likely to expand further in 2026.

However, the growth in imports will remain constrained by persistent logistical limitations. Unless new quarantine facilities are operational by 2026, the capacity shortage will continue to limit the volume of imported breeding swine. There are reports of a new quarantine facility opening in Shandong Province in the near future.

2025 Breeding Swine Import Estimate Revised Down

Post revised down its 2025 estimate for live swine imports due to increased uncertainty in the international trade environment and weakening import demand. Sources indicate that since the beginning of 2025, several previously signed contracts were canceled or delayed as importers feared potential disruptions. U.S. exporters also reported that some buyers hesitated to confirm shipments or delayed arranging chartered flights. Additionally, in the current economic climate, some small- and mid-sized producers opted to delay or suspend imports to avoid the risks associated with rising costs and unclear regulatory conditions.

Post also notes that logistical bottlenecks further constrained breeding swine imports. Limited quarantine space meant that some contracted shipments could not enter China on schedule. Even where demand remained, lack of available quarantine slots created delays that discouraged follow-on orders. Additionally, high transportation costs³ added to the burden. Importers must also navigate complex coordination of transport, customs, and animal health protocols, where any disruption can lead to shipment failure. These logistical and cost-related challenges compounded the overall decline in breeding swine imports in early 2025.

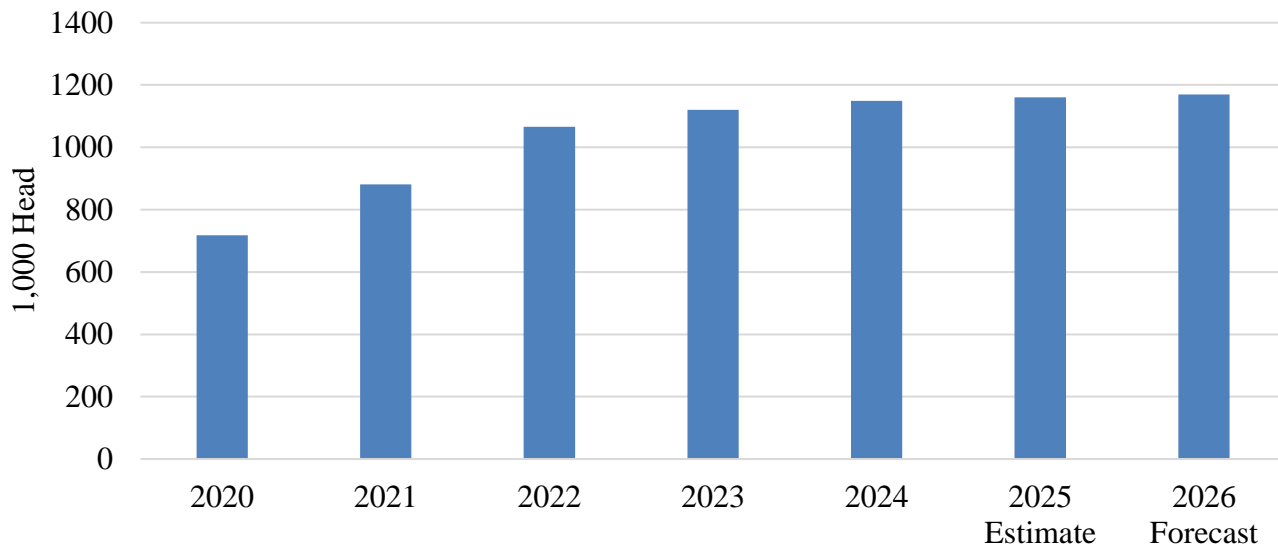
Swine Exports

2026 Live Swine Exports to Increase Modestly

Post anticipates modest growth in China's live swine exports in 2026, supported by recovering demand from Hong Kong and Macao (see Chart 7). In the first half of 2025, exports to these markets rose year-over-year but remained below pre-pandemic levels (i.e., prior to 2019). The rebound in 2025 mainly reflected the recovery of tourism and the hotel, restaurant, and institutional (HRI) sectors. As tourism and foodservice continue to improve in 2026, buyers in these markets will likely increase their purchases of live swine from the mainland. A well-established supply chain between mainland China and the two destinations further supports export growth. Inspection protocols are already in place. However, expansion rates may remain limited. Broader economic uncertainty in the regions could also constrain further gains.

³ Sources estimated at RMB 3–5 million per chartered flight carrying 1,000 pigs.

Chart 7. China: Live Swine Exports



Source: Trade Data Monitor, LLC and Post Forecast

PORK

Table 4. China: Pork Production, Supply, and Distribution

Meat, Swine Market Year Begins	2024		2025		2026	
	Jan 2024		Jan 2025		Jan 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
China						
Slaughter (Reference) (1000 HEAD)	702,560	702,560	701,000	703,000	0	703,800
Beginning Stocks (1000 MT CWE)	0	0	0	0	0	0
Production (1000 MT CWE)	57,060	57,060	57,000	57,150	0	57,150
Total Imports (1000 MT CWE)	1,306	1,306	1,300	1,330	0	1,300
Total Supply (1000 MT CWE)	58,366	58,366	58,300	58,480	0	58,450
Total Exports (1000 MT CWE)	97	97	100	100	0	105
Human Dom. Consumption (1000 MT CWE)	58,269	58,269	58,200	58,380	0	58,345
Other Use, Losses (1000 MT CWE)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT CWE)	58,269	58,269	58,200	58,380	0	58,345
Ending Stocks (1000 MT CWE)	0	0	0	0	0	0
Total Distribution (1000 MT CWE)	58,366	58,366	58,300	58,480	0	58,450

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Note: Not Official USDA Data

PRODUCTION

Pork Production in 2026 to Remain Stable

Post forecasts that China's pork production will remain stable in 2026, supported by consistent piglet production and adequate fattened swine availability. However, average slaughter weights in 2025 and 2026 may decline compared to 2024. In the first half of 2025, several major producers issued guidance discouraging "second fattening" practices—a strategy previously used to increase carcass weights. While these efforts marked a shift in industry behavior, the impact on slaughter weights may lag. Some hogs processed in early 2025 likely originated from late-2024 secondary fattening batches, and producers may have continued "weight-holding" strategies. As a result, average slaughter weights did not decline noticeably in the first half of 2025. However, the cumulative effect of policy and behavioral changes could become more evident in 2026, potentially resulting in slightly lighter carcasses. Stagnant pork demand in 2026 will also discourage producers from increasing slaughter volume beyond current levels.

Pork Production in 2025 Revised Up

Post revised up its estimate for China's 2025 pork production to 57.15 million metric tons (MMT), reflecting a 1 percent increase from the previous year. The adjustment is based in part on official data from NBS, which reported pork production in the first half of 2025 at 30.2 MMT, a year-over-year increase of 390,000 tons or 1.3 percent.

However, if pork prices continue to decline in the second half of 2025—as observed through May—some producers may scale back slaughter plans in response to tightening margins. Falling prices could also encourage lighter carcass weights. These factors may constrain further output growth in the latter part of the year, capping full-year production gains.

CONSUMPTION

Pork Consumption in 2026 to Hold Steady

Post forecasts that China's pork consumption in 2026 will remain stable with a slight decline, as the market reaches a structural plateau with pork losing market share to other animal proteins amid shifting consumer preferences. Pork's dominant position in China's protein mix is gradually being eroded by rising consumption of poultry, eggs, dairy, and aquatic products. Health-conscious consumers, particularly in urban areas, are incorporating a broader range of proteins, alongside pork, into their diets. In March 2025, China's Ministry of Agriculture and Rural Affairs, along with the National Health Commission and the Ministry of Industry and Information Technology, issued the Outline of National Food and Nutrition Development (2025–2030). The plan promotes diversified protein intake and improved dietary structure. While this policy supports broader dietary shifts, changing demographics and consumer preferences appear to be the primary drivers of the transition toward more varied protein sources, especially in first- and second-tier cities.

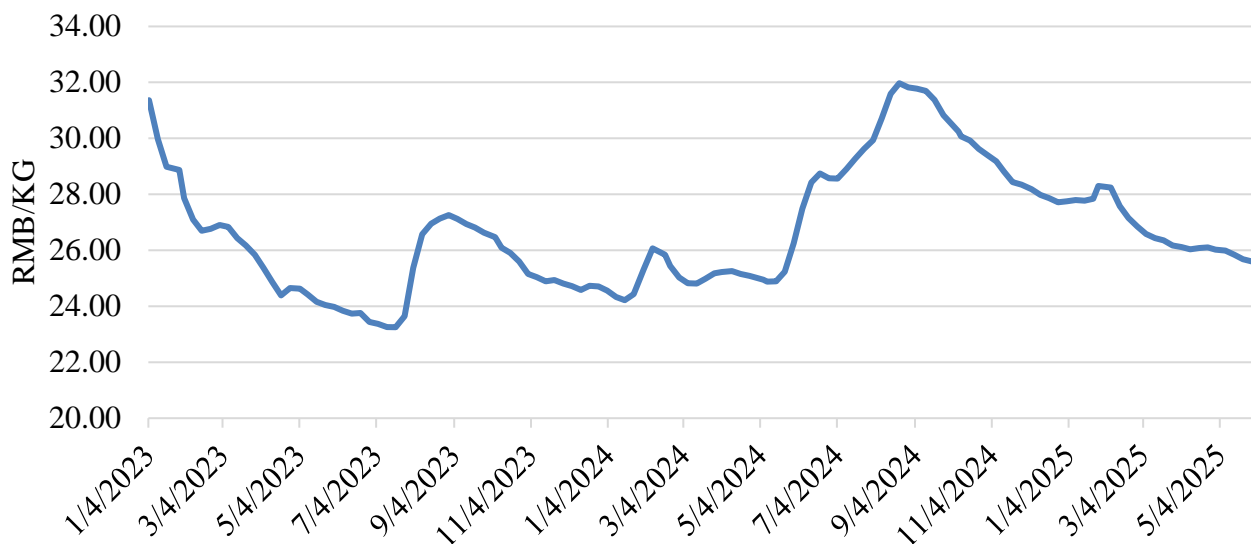
Younger consumers show less attachment to traditional pork dishes, while aging populations are reducing meat intake overall. These patterns further contribute to a gradual long-term decline in per

capita pork consumption. However, Post expects demand in certain segments to remain stable. Pork will continue to play a role in frozen processed foods, ready-to-eat meals, and group catering. These channels, along with chilled and frozen pork sales in smaller cities, are expected to sustain baseline demand, particularly for low-cost, lower-margin products. Nevertheless, stable demand in these segments is unlikely to reverse the broader downward trend in overall consumption.

Pork Consumption in 2025 Revised Up

Post adjusted its 2025 estimate for China’s pork consumption slightly upward, reflecting greater market availability due to increased domestic production. However, the steady decline in pork prices during the first five months of the year (see Chart 8) suggests that actual consumer demand remains weak. Industry sources note that sluggish economic growth, weak consumer confidence, and a shift toward alternative proteins have continued to suppress pork consumption. Foodservice and retail channels also reported slower-than-expected sales growth. As a result, Post believes the higher consumption figure reflects greater supply absorption rather than stronger underlying demand.

Chart 8. China: National Average Pork Price⁴



Source: MARA

TRADE

Pork Imports

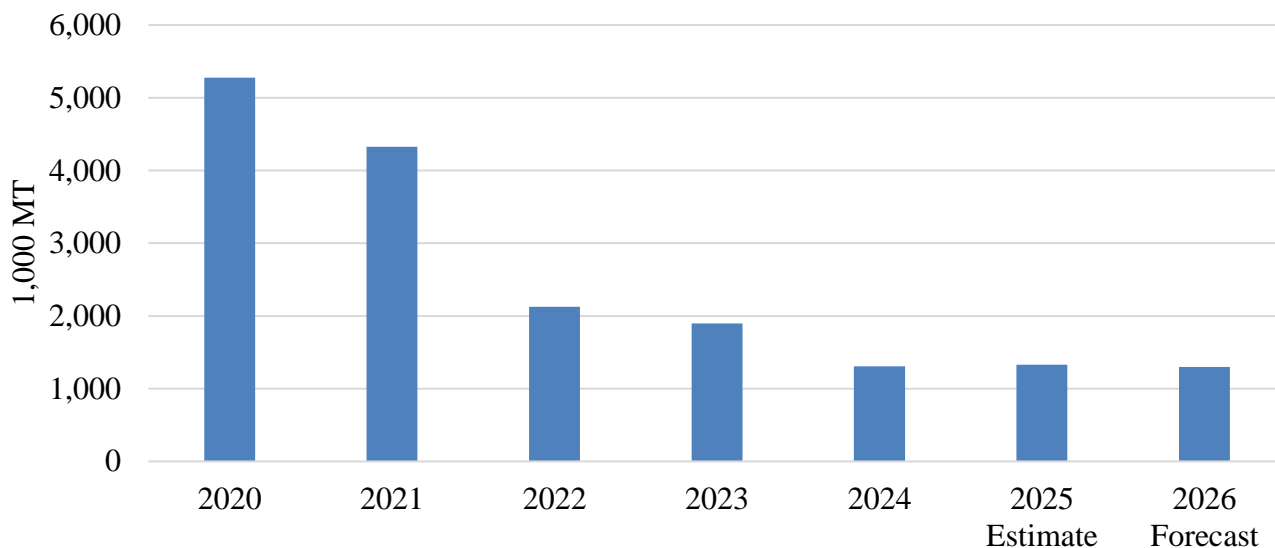
Pork Imports in 2026 to Decline

Post forecasts that weakening demand and sufficient domestic supplies will drive China’s pork imports lower in 2026, following a moderate increase in 2025 and reflecting shifting market conditions and stable consumption (see Chart 9). China’s steady pork production in 2026, with no anticipated significant shortfalls, will ensure a reliable domestic supply, reducing the need for buyers to rely on

⁴ The pork price reflects the average pork price collected by MARA from monitored traditional markets across China.

imported product compared to previous years marked by supply gaps and herd fluctuations. Imports will continue to serve segments such as frozen processing and foodservice.

Chart 9. China: Pork Imports



Source: Trade Data Monitor, LLC and Post Forecasts

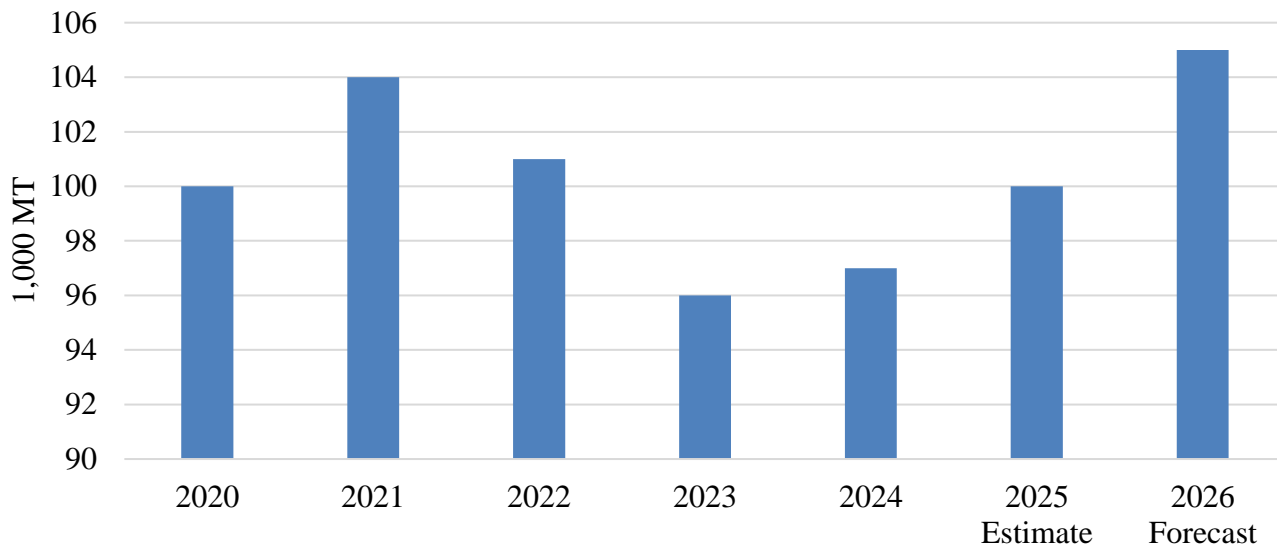
Importers report remaining cautious about sourcing U.S. pork due to ongoing regulatory and political uncertainties. Some buyers have reduced shipments from the United States or shifted to alternative suppliers to avoid potential disruptions related to customs clearance, licensing, or renewed policy action.

Pork Exports

Pork Exports in 2026 to Rise Slightly

Post forecasts a modest increase in China's pork exports in 2026, driven by recovering demand from key markets like Hong Kong and Japan, though growth will be constrained by strong competition from other suppliers (see Chart 10). China's pork exports consistently exceeded 135,000 metric tons between 2015 and 2019. However, volumes dropped sharply following the African swine fever (ASF) outbreak in 2019–2020 as domestic supplies contracted and prices surged. Exports remained depressed through the COVID-19 period (2020–2022) due to logistics disruptions and weaker international demand and fell even further in 2023 despite a gradual recovery in domestic production. Export activity only began to show signs of recovery in 2024. Trade data from the first five months of 2025 indicate continued year-over-year growth.

Chart 10. China: Pork Exports



Source: Trade Data Monitor, LLC and Post Forecast

PORK VARIETY MEAT

Pork Variety Meat Imports in 2026 to Remain Elevated

Post expects China’s pork variety meat imports to remain elevated in 2026. Official trade data show consistently high import volumes under HS code 020649 (frozen edible swine offal, excluding livers), which remains the dominant category in China’s pork variety meat trade. From 2020 to 2024, annual imports under this code exceeded 1 MMT each year. In the first five months of 2025, imports were slightly above the same period in 2024, indicating sustained trade momentum.

Pork variety meats such as pork knuckle, sliced pig ears, and pork tongue are widely used in traditional Chinese cuisine, featured in braised dishes, hot pot, and ready-to-eat meals. These products enjoy broad acceptance in lower-tier cities and regional foodservice markets, where cost sensitivity is high, but substitution remains limited.

Domestic supply constraints further reinforce demand for imported products. While domestic consumption of variety meats remains strong, structural limitations in China’s slaughtering and processing systems continue to affect the availability and standardization of locally produced offal. Imported products offer both cost competitiveness and consistent supply.

Major suppliers, including the United States, the EU, and Canada, have maintained long-term export relationships with China. The United States remains China’s largest single supplier. However, the Chinese Government continues to impose elevated tariffs on U.S. pork and variety meats, with rates significantly higher than those applied to other origins. In the first five months of 2025, U.S. exports of pork variety meats to China declined year-over-year. Post expects these high tariffs to continue weighing on U.S. exports to China in 2026.

Delayed Renewal of U.S. Beef Establishments Restricts Market Access in China

In February 2025, the General Administration of Customs of China (GACC) allowed four U.S. beef and two pork establishments to lapse in the China Import Food Enterprise Registration (CIFFER) system (<https://ciferquery.singlewindow.cn/>; see GAIN report [CH2025-0040](#)). In March 2025, GACC renewed the establishment registrations for the two U.S. pork establishments (see GAIN report [CH2025-0056](#)) but has continued to allow additional U.S. beef establishments to expire in March, April, May, and July. GACC did renew 6 U.S. beef establishments in July, but over 400 U.S. beef establishments remain expired in the CIFER system. The lack of updated registration continues to restrict U.S. beef exports to China.

Retaliatory Tariffs on U.S. Products

China currently imposes a 10-percent tariff on all U.S. products based on the joint agreement announced on May 12, 2025 (see GAIN Report [CH2025-0111](#)). On August 12, China announced an extension of the current tariff policy following trade negotiations in Stockholm (see GAIN report [CH2025-0164](#)). In addition, China imposed an additional 15-percent retaliatory tariff on poultry, wheat, corn, and cotton and 10-percent retaliatory tariff on sorghum, soybeans, pork, beef, aquatic products, fruit, vegetables, and dairy products on March 4, 2025. This was in response to U.S. tariffs on Chinese exports following China's failure to curb the flow of fentanyl precursor chemicals to the United States (see GAIN Report [CH2025-0044](#)).

The tariff exclusion process introduced by the State Council Tariff Commission (SCTC) in March 2020 (see GAIN report [CH2020-0017](#)) remains in effect. The program allows importers to apply for tariff exclusions on the Chinese Government's retaliatory Section 301 tariffs on U.S. products, including pork and beef (see Table 5 and Table 6 for specific tariff rates). The exclusion process does not apply to China's retaliatory Section 232 tariffs, which continue to affect U.S. pork products along with many other agricultural goods. If an importer secures an exclusion from the retaliatory Section 301 tariff, the total applied tariff will consist of China's WTO-notified Most Favored Nation (MFN) tariff plus the additional retaliatory Section 232 tariff. China's Ministry of Finance recently extended the application deadline for Section 301 tariff exemptions to October 30, 2025, with approved exclusions remaining valid until December 13, 2025 (see GAIN Report [CH2025-0513](#)). The following tables summarize the current tariffs on U.S. beef and pork exports to China.

Table 5. China: Tariff on U.S. Beef Products

HS Code (8-digit)	Product Description	MFN Rate*	Section 301 Retaliation*	SCTC Ann. No. 2	MOFCOM May 12, 2025	Total Applied Tariff	Total Applied Tariff with 301 Exclusion
02011000	Meat of bovine animals, fresh or chilled: whole or half-carcasses	20%	25.0%	10%	10%	65.0%	40.0%
02012000	Fresh Or Chilled Unboned Bovine Meat (Excl. Carcasses)	12%	30.0%	10%	10%	62.0%	32.0%
02013000	Fresh Or Chilled Boneless Bovine Meat	12%	30.0%	10%	10%	62.0%	32.0%
02021000	Frozen Bovine Carcasses & Half Carcasses	25%	25.0%	10%	10%	70.0%	45.0%
02022000	Frozen Unboned Bovine Meat (Excl. Carcasses)	12%	30.0%	10%	10%	62.0%	32.0%
02023000	Frozen Boneless Bovine Meat	12%	30.0%	10%	10%	62.0%	32.0%
02102000	Meat Of Bovine Animals, Salted, In Brine, Dried Or S	25%	30.0%	10%	10%	75.0%	45.0%
16025010	Preparations Of Bovine Animal Meat & Offal, In Air	5%	2.5%	10%	10%	27.5%	25.0%
16025090	Preparations Of Bovine Animal Meat & Offal, Nes	5%	25.0%	10%	10%	50.0%	25.0%

Note: *Additional tariffs were adjusted on February 14, 2020, and additional exclusions granted on March 2, 2020. China's Ministry of Finance recently extended eligibility for application for Section 301 tariff exemption to October 30, 2025, with all approved exclusions remaining valid until December 13, 2025.

Table 6. China: Tariff on U.S. Pork Products

HS Code (8-digit)	Product Description	MFN Rate	Section 232 Retaliation	Section 301 Retaliation*	SCTC Ann. No. 2	MOFCOM May 12, 2025	Total Applied Tariff	Total Applied Tariff with 301 Exclusion
02031110	Fresh or chilled, suckling pig: whole or half-carcasses	20%		25.0%	10%	10%	65.0%	40.0%
02031190	Fresh or chilled, other meat of swine: whole or half-carcasses	20%		25.0%	10%	10%	65.0%	40.0%
02031200	Fresh Or Chilled Unboned Hams, Shoulders & Cuts	20%	25%	30.0%	10%	10%	95.0%	65.0%
02031900	Other Fresh Or Chilled Swine Meat	20%	25%	30.0%	10%	10%	95.0%	65.0%
02032110	Frozen, suckling pig: whole or half-carcasses	12%		25.0%	10%	10%	57.0%	32.0%
02032190	Frozen Swine, whole or half-carcasses, Nes	12%	25%	25.0%	10%	10%	82.0%	57.0%
02032200	Frozen Unboned Hams, Shoulders & Cuts Thereof Of	12%	25%	30.0%	10%	10%	87.0%	57.0%
02032900	Other Frozen Swine Meat	12%	25%	30.0%	10%	10%	87.0%	57.0%

Note: *Additional tariffs were adjusted on February 14, 2020, and additional exclusions granted on March 2, 2020. China's Ministry of Finance recently extended eligibility for application for Section 301 tariff exemption to October 30, 2025, with all approved exclusions remaining valid until December 13, 2025.

Attachments:

No Attachments