

Research Report on Beef Import in China, 2019-2023

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Abstracts

Description

With the development of China's economy and the improvement of living standards, the demand for beef in China is rising. The upward cattle breeding cost makes it difficult to sharply increase the beef output in China. In response to the growing beef consumption, China is importing more beef. From 2013 to 2017, the beef output volume in China grew from 6,130,900 tons to 6,346,200 tons at a CAGR of only 0.9%, while the beef imports grew at a CAGR of nearly 24%.

The Chinese government's policies on beef import include restrictions and incentives. On one hand, to control epidemics and support domestic beef industry, the Chinese government bans the import of cattle and cattle products from high-risk countries and regions. On the other hand, it signs trade agreements with some countries to cut the tariffs on beef imports and increase the beef supply in China. The government is strict with the sources of beef imports. Only the countries and regions included in China Customs' List of Meat Eligible for Export to China from Countries or Regions that Meet the Requirements of Assessment and Review can export beef to China. In Nov. 2018, the list included only 16 countries such as the U.S., Canada, Argentina, Chile and Uruguay.

The beef imported to China include chilled beef and frozen beef. Frozen beef has been the main stream of China's beef imports. From 2013 to 2017, the proportion of frozen beef in China's beef imports stayed above 96%. In 2017, this proportion reached about 99%.

China's beef imports mainly come from Brazil, Australia, Uruguay, New Zealand and Argentina. In 2017, the five countries contributed more than 90% of both the import value and import volume of beef in China.

It was not until Jul. 2017 that U.S. beef was allowed to enter China. Therefore, U.S. beef sells badly in China, and can hardly compete with the beef from countries like Brazil and Australia. As U.S. beef, whether by volume or value, takes up a small proportion of China's beef imports, the Sino-U.S. trade war has little impact on the export of U.S beef. to China.

According to CRI's market research, China impose high tariffs and value-added tax on beef imports, and most countries in the world cannot legally export beef to China. Therefore, many enterprises smuggle beef to China. The smuggled beef mainly come from India and Brazil by water transport and road transport. By water transport, the smuggled beef is directly shipped from India and Brazil to China's coastal ports, and then distributed to all parts of the country. By road transport, the smuggled beef is transported via Hong Kong to Shenzhen, or entered China via the border between Vietnam and Guangxi. In addition to the cheap beef from India and Brazil, Wagyu beef from Japan and other types of high-end beef are also smuggled. Smuggled beef and legally imported beef share similar end consumers, namely, households, catering enterprises and food processing enterprises.

It is expected that the import volume of beef in China will continue to grow from 2019 to 2023.

Topics Covered

The Chinese government's policies on beef import

Beef import in China

Major types of China's beef imports

Major sources of China's beef imports

Favorable and unfavorable factors influencing beef import in China

Prospect of beef import in China, 2019-2023

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