

China Meat Market By Product Type (Chicken, Beef, Mutton, Pork and Others), By Type (Raw and Processed), By Distribution Channel (Departmental Stores, Specialty Stores, Hypermarket/ Supermarket, Online, Others), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

The China Meat Market was valued at USD 83.68 Billion in 2024 and is expected to reach USD 258.17 Billion by 2030 with a CAGR of 20.72% during the forecast period. China's meat market is growing due to rising urbanization, increasing incomes, and shifting dietary preferences towards meat-based diets. Consumers are demanding more variety, including beef, pork, and poultry. The growing middle class is willing to spend on premium products, while technological advancements in farming and processing have improved supply efficiency. Additionally, the expansion of modern retail outlets and e-commerce platforms has made meat more accessible. These factors, combined with stronger economic growth and evolving consumption habits, have driven the rapid expansion of the Chinese meat market. China's meat industry has experienced significant growth over the past few decades, driven by rising incomes, urbanization, and changing dietary habits.

In 2022, the country produced around 92.27 million tons of meat in total, a 3.8 percent increase compared to the previous year. Pork production, in particular, has grown rapidly, increasing from around 40 million tons in 1990 to over 55.41 million tons in 2022. In comparison, beef and poultry production have also increased steadily over the past few decades, but at a slower rate. Meanwhile, China is also the world's largest meat consumer, with an estimated per capita consumption of over 53 million tons of pork and 10 million tons of beef and veal in 2022. In 2022, pork accounted for around

60 percent of China's total meat consumption. Poultry was the second most consumed meat, accounting for around 20 percent of total consumption, followed by beef at around 10 percent.

Key Market Drivers

Rising Incomes and Changing Consumption Patterns

As China's economy continues to grow, disposable incomes have risen significantly, particularly within the growing middle class. This has led to shifts in consumer spending patterns, particularly in food consumption. Historically, China had a diet largely based on grains like rice and vegetables. However, with higher income levels, Chinese consumers are increasingly able to afford more protein-rich foods, including meat, which has become a more prominent part of their diets. This is particularly evident in urban areas, where economic prosperity has created a strong demand for more diverse and premium food choices.

The rise in meat consumption can also be attributed to the changing dietary habits driven by global influences. As the younger generation in China becomes more exposed to Western food habits and international cuisines, they are adopting more protein-heavy diets. International fast food chains, supermarkets, and online food services have introduced different types of meats such as beef, chicken, and pork, which have become commonplace in urban diets. Moreover, these meats are often perceived as offering greater nutritional value and variety compared to traditional foods. Consumers are now also willing to pay a premium for higher-quality meats, including organic, free-range, or hormone-free options, reflecting an increased awareness of health and food quality.

Urbanization and Changing Lifestyle

China's rapid urbanization is a significant factor driving the growth of its meat market. Over the past few decades, millions of Chinese people have moved from rural areas to cities, where they gain access to improved living standards, better infrastructure, and modern retail options. Urban consumers tend to have higher purchasing power and access to a wide variety of food products, including fresh and processed meats, which are often unavailable in rural regions. Supermarkets, hypermarkets, and online platforms in urban areas offer a broader selection of meat products, making it easier for consumers to purchase different kinds of meat.

Additionally, the fast-paced and increasingly demanding lifestyle of urban dwellers has spurred the demand for convenience foods, including pre-cooked or ready-to-eat meat products. This trend has significantly impacted the consumption patterns of meats such as sausages, chicken nuggets, and packaged meats, which are considered quick and easy options for busy professionals. With urban lifestyles that prioritize time-saving, frozen meats, marinated meats, and convenience-oriented meat products are increasingly popular. Furthermore, urbanization has led to greater exposure to global food trends. As cities become more cosmopolitan, urban dwellers are becoming more open to international cuisines and meat products. For instance, beef steaks, deli meats, and sausages have gained popularity, reflecting the evolving palate of Chinese consumers. As more urban areas adopt a modern retail approach, the consumption of diverse meats is expected to grow, continuing to fuel the overall expansion of the meat market.

Government Policies and Agricultural Support

The Chinese government plays a central role in shaping the meat market through a variety of policies that support domestic production and consumption of meat. Agriculture in China, including livestock farming, has historically been an important sector. To meet the growing demand for meat, the Chinese government has taken steps to modernize and improve the efficiency of domestic meat production. It has invested in modern farming technologies, improved animal husbandry practices, and enhanced supply chain management to ensure a steady and safe supply of meat.

The key focus areas for the Chinese government has been the development of the pork industry, as pork is the most widely consumed meat in China. The government has provided subsidies to pork producers to help them maintain consistent supply levels, particularly in times of market disruption. The outbreak of African Swine Fever in 2018 severely affected China's pork production, but government intervention helped stabilize the industry and minimize the impact on consumers. Policies that promote biosecurity and improved animal welfare standards have also been implemented to maintain the quality and safety of meat products. Moreover, the government has been encouraging the diversification of meat production to reduce the country's reliance on imported meats. Policies aimed at increasing beef and chicken production have been introduced, along with initiatives to enhance food safety regulations, improve traceability systems, and increase domestic meat processing capabilities. These measures have contributed to increasing the availability of domestically produced meat and enhancing consumer confidence.

China's Ministry of Commerce (MOFCOM) has launched an investigation into beef imports following concerns from domestic industry groups. Between 2019 and mid-2024, beef imports surged, with 2023 imports rising by 64.93% compared to 2019. China's beef imports totaled USD14.2 billion in 2023, up from USD8.2 billion in 2019, according to customs data. Brazil led the trade, contributing 42% of the total value, followed by Argentina at 15% and Australia at 12%. The market share of imported beef has increased significantly, and imports reached 2.6 million tons in 2024, affecting domestic prices. Due to the influx of imports, domestic beef and live cattle prices have dropped to their lowest levels in years, severely impacting the local cattle industry.

Key Market Challenges

Supply Chain and Food Safety Concerns

One of the biggest challenges in China's meat market is the complex and often underdeveloped supply chain, which can lead to inefficiencies and food safety concerns. Despite substantial investments in infrastructure and modern retail systems, China's meat supply chain still faces difficulties related to logistics, storage, and quality control. The country is vast, with diverse climates and infrastructure, which can complicate the distribution of fresh meat across urban and rural areas. Meat products often require specialized transportation and refrigeration, and delays or improper handling can result in spoilage and contamination. Food safety is a critical issue in China, and the meat sector has been marred by several high-profile scandals involving tainted meat products, such as the use of harmful chemicals, poor hygiene in slaughterhouses, and unregulated production practices. In the past, incidents such as the discovery of lean meat powder, a banned additive, and reports of sick animals entering the food supply, have raised concerns about meat quality. While the Chinese government has taken steps to strengthen food safety regulations, including stricter inspections and better traceability systems, maintaining high standards across the entire supply chain remains a challenge. Consumers are increasingly concerned about the safety of their food, which can influence their buying decisions, especially as incidents of food fraud or contamination undermine consumer confidence in the market.

Environmental Sustainability and Resource Management

Environmental sustainability is another significant challenge for China's meat market, particularly as the country's meat production and consumption continue to rise. The meat industry, especially pork and beef production, is resource-intensive, requiring substantial land, water, and energy inputs. China's meat sector contributes significantly

to greenhouse gas emissions, deforestation, and water consumption, with pork farming being particularly demanding on the environment. As the population grows and urbanization increases, the demand for meat continues to outstrip the supply of natural resources, exacerbating environmental pressures. China's livestock sector also contributes to water pollution due to manure runoff, which can affect both water quality and the surrounding ecosystems. This issue is particularly prevalent in rural areas where large-scale pig farming and other animal husbandry practices are prevalent. The use of chemical fertilizers and pesticides in feed production further adds to the environmental footprint.

Key Market Trends

Shift Towards Premium and High-Quality Meat Products

As China's middle class continues to expand and disposable incomes rise, there is a growing demand for premium and high-quality meat products. The shift towards higher-quality meats is one of the most significant trends in the Chinese meat market. Consumers, particularly in urban areas, are increasingly willing to pay a premium for meats perceived as safer, healthier, and more sustainably produced. This trend is evident in the rising demand for organic, grass-fed, antibiotic-free, and hormone-free meats, which reflect the growing awareness of food safety and health concerns. In recent years, the Chinese consumer has become more discerning, focusing not just on quantity but on the quality of the meat they consume. For example, in pork production, there is an increasing preference for premium breeds such as the "China white" pig, which is known for its superior taste and tenderness compared to conventional breeds. Additionally, beef consumption has risen, with Chinese consumers now seeking higher-quality cuts such as ribeye, sirloin, and steaks, which were previously considered luxury items. The increasing interest in Western-style diets and international cuisines has also contributed to this demand for premium beef.

Growth of Plant-Based and Alternative Proteins

Another important trend in the China meat market is the increasing popularity of plant-based and alternative proteins. As environmental concerns, health consciousness, and changing dietary preferences grow, many Chinese consumers are exploring alternatives to traditional meat. The market for plant-based meat substitutes, like those made from soy, peas, and rice, has experienced rapid growth in recent years. Companies such as Beyond Meat and Impossible Foods have made significant inroads into China, catering to the growing demand for plant-based meat that mimics the taste, texture, and

nutritional benefits of animal-based products. This shift is particularly prevalent among younger consumers and in urban areas where there is more exposure to global food trends and dietary innovations. Health-conscious consumers, including those adopting flexitarian diets, are increasingly looking for plant-based options as a way to reduce cholesterol intake, lower their carbon footprint, or manage their weight. Many of these consumers are attracted to plant-based meat for its perceived environmental benefits, as it has a significantly lower carbon footprint compared to traditional animal farming. Furthermore, plant-based alternatives align with traditional Chinese culinary preferences, particularly the use of tofu and soy products in everyday cooking. This cultural familiarity makes the transition to plant-based proteins smoother for Chinese consumers.

Expansion of Online Meat Sales and E-Commerce Platforms

The rise of e-commerce and online shopping is a major trend transforming the meat market in China. With the increasing reliance on digital platforms for daily shopping, more consumers are turning to online grocery stores and meat delivery services for their meat purchases. Online platforms offer a wide variety of meats, from fresh cuts to processed products, and provide the convenience of home delivery. The growth of online meat sales has been particularly accelerated by the COVID-19 pandemic, which encouraged consumers to adopt online shopping for safety and convenience. Many e-commerce platforms, such as Alibaba's Freshippo and JD.com, have expanded their offerings to include fresh, chilled, and frozen meat products. These platforms have been investing heavily in improving their cold chain logistics to ensure that meat products reach consumers in optimal condition. The ability to shop for high-quality meats from trusted sources, often with better traceability, has made online shopping for meat more attractive to consumers who are increasingly focused on the quality and safety of their food. The convenience of online shopping also aligns with the busy, urban lifestyles of many Chinese consumers. Busy professionals and families, especially in larger cities, appreciate the ease of purchasing meats online and having them delivered directly to their doorstep. Additionally, online platforms often provide detailed product information, including sourcing details, nutritional facts, and quality certifications, which can influence purchasing decisions, particularly in the premium segment.

Segmental Insights

Product Type Insights

In China, pork is the leading segment in the meat market, making up a significant

portion of total meat consumption. Pork has been the cornerstone of Chinese cuisine for centuries, deeply embedded in cultural traditions, festivals, and daily meals. The meat is favored for its versatility, flavor, and the wide variety of cuts and preparations it offers, from fresh cuts to sausages, cured meats, and other processed products. Pork accounts for about 60% of total meat consumption in China, far outpacing other meats like chicken, beef, and mutton. The Chinese diet traditionally relies on pork as the primary source of animal protein, with dishes like dumplings, roast pork, and pork stir-fries being staple meals in households across the country. The domestic production of pork is vast, with China being both the largest producer and consumer of pork in the world. Despite this, China's pork industry has faced significant challenges, such as outbreaks of African Swine Fever (ASF), which decimated the national pig herd and disrupted pork supply chains. In response, the country has increased pork imports to stabilize supply and meet the growing demand. Even with these challenges, pork remains the dominant meat in China's market. The Chinese government has supported pork producers through subsidies and other measures to ensure a steady supply. As urbanization continues and dietary habits evolve, while chicken and beef consumption are on the rise, pork's cultural significance and versatility ensure it will continue to lead the Chinese meat market for the foreseeable future.

Regional Insights

The east region of China is the leading region in the meat market. This area includes major economic hubs such as Shanghai, Beijing, Hangzhou, and Nanjing, which are home to a large urban population with higher disposable incomes and evolving dietary preferences. The east also benefits from advanced infrastructure, including transportation networks and cold chain logistics, making it easier to distribute meat products efficiently. In addition, the east region is known for its modernization and openness to international food trends, which has contributed to the growing demand for a variety of meat products, including beef, pork, and chicken. Urban consumers in this region have increasingly diversified their diets, leading to a surge in meat consumption. The presence of international and local supermarkets, foodservice outlets, and e-commerce platforms further drives demand. The concentration of major cities and the urban middle class in the east region has made it the largest market for meat consumption in China, surpassing other regions in terms of both volume and spending. This trend is expected to continue as urbanization, rising incomes, and changing consumption patterns persist. Thus, the east region is central to China's meat market, both in terms of consumption and industry activity.

Key Market Players

China Yurun Food Group Ltd.

Cherkizovo Group

Shanghai Maling Food Co., Ltd.

WH Group Limited

Shandong Longda Meishi Co., Ltd.

Zhongjing Food Co., Ltd.

Zhejiang Huatong Meat Products Co., Ltd.

Springsnow Food Group Co., Ltd.

Shandong Huifa Foodstuff Co., Ltd.

Tyson Foods, Inc.

Report Scope:

In this report, the China Meat Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

China Meat Market, By Product Type:

Chicken

Beef

Mutton

Pork

Others

China Meat Market, By Type:

Raw

Processed

China Meat Market, By Distribution Channel:

Departmental Stores

Specialty Stores

Hypermarket/ Supermarket

Online

Others

China Meat Market, By Region:

South-Central

South-West

East

North-East

North-West

North

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the China Meat Market.

Available Customizations:

China Meat Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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