Summary

The *China Agricultural Outlook Report (2026–2035)* (hereinafter referred to as the *Outlook Report*) examines 20 key agricultural commodities, reviewing market performance during the "14th Five-Year Plan" period and 2025, and projecting production, consumption, trade, and price trends over the next decade. Special emphasis is placed on the "15th Five-Year Plan" period and pivotal years, including 2026, 2030, and 2035. The report also analyzes and discusses potential uncertainties.

The projections in the *Outlook Report* are based on a combination of quantitative analysis and qualitative assessment, underpinned by assumptions regarding China's socioeconomic conditions and policy environment over the next decade. The report anticipates that China's economic growth will maintain strong resilience during the outlook period, with the following specific assumptions: Economic Growth: China's GDP is projected to maintain an average annual growth rate of 4.6% from 2026 to 2035 compared to 2025; Income Trends: Per capita disposable income is expected to grow at annual rates of 4.3% (urban) and 6.5% (rural, both in real terms), further narrowing the urban-rural income gap; Demographics: The total population shows a gradual decline, decreasing at an average annual rate of 1.1‰, while the increase in the population with higher education will gradually manifest a talent dividend; Urbanization: The permanent resident urbanization rate is forecast to reach 75.0% by 2035; Price Stability: The Consumer Price Index (CPI) is expected to fluctuate within a reasonable range, with annual increases between 1.0% and 2.5%; Exchange Rates: The RMB exchange rate will show a trend of moderate appreciation, with the annual average USD/CNY midpoint projected between 6.6 and 6.9; and Commodity Markets: International crude oil prices are expected to experience intense short-term volatility while exhibiting a long-term downward trend.

In 2025, China's agricultural and rural development maintained stable and positive momentum with steady quality improvements. Comprehensive rural

revitalization was solidly advanced, and the modernization of agriculture and rural areas accelerated. Grain production achieved another bumper harvest, and the supply of "vegetable basket" products remained ample. The total grain sown area in 2025 reached 119.0 million hectares, up 0.1% year-on-year; National grain output reached 715 million tons, up 1.2% year-on-year, setting a new historical record and stabilizing above 700 million tons for two consecutive years. Achievements in expanding soybean and oilseed cultivation were effectively consolidated: Soybean sown area remained stable above 10 million hectares, with output at 20.91 million tons, up 1.3% year-on-year, and has remained above 20 million tons for four consecutive years; Oilseed sown area reached 14.44 million hectares, up 1.1% year-on-year, with output at 40.96 million tons, up 2.9% year-on-year. Cotton sown area and output both increased, reaching 2.979 million hectares and 6.64 million tons, up 5.0% and 7.7% year-on-year respectively. Meat production developed steadily, exceeding 100 million tons for the first time. Annual total meat output was 101.94 million tons, up 4.2% year-on-year. The production breakdown by category shows: Pork: 59.38 million tons (up 4.1% YoY); Poultry: 28.37 million tons (up 6.7% YoY); Beef: 8.01 million tons (up 2.8% YoY); Lamb/Mutton: 4.96 million tons (down 4.2% YoY). Poultry egg output declined to 34.98 million tons, down 2.5% year-on-year; milk and aquatic product outputs were 40.91 million tons (up 0.3% YoY) and 76.57 million tons (up 4.1% YoY) respectively. Vegetable and fruit markets were well-supplied, with outputs increasing by 2.5% and 5.7% year-on-year respectively. **The supply structure of agricultural products was continuously optimized, and the level of agricultural modernization steadily improved.** In 2025, the contribution rate of agricultural scientific and technological progress exceeded 64%. The seed industry revitalization action was solidly advanced, with the conservation level of agricultural germplasm resources continuously improving; the proportion of independently selected crop varieties exceeded 95%, and the market share of domestic livestock, poultry, aquatic, and vegetable seed sources exceeded 80%, 86%, and 91% respectively. Support from technological equipment

continued to strengthen, with the comprehensive mechanization rate of crop cultivation and harvesting reaching 76.7%. The supply of green and premium agricultural products continued to increase, with the total number of green food, organic products, premium, specialty, innovative, and geographical indication agricultural products exceeding 88,000, and the pass rate in routine monitoring of agricultural product quality safety reaching 98%. The proportion of high-quality edible rice, specialized wheat, and high-oil/high-protein soybeans increased, as did the supply of premium beef, mutton, and aquatic products. High-standard farmland construction progressed steadily, with 5.05 million hectares newly built or upgraded, bringing the accumulative total to over 66.67 million hectares, and the farmland irrigation water use efficiency coefficient increased to 0.583. Smart agriculture application scenarios expanded across the entire chain, with agricultural drone ownership exceeding 300,000 units and annual operational area surpassing 30.67 million hectares. **Agricultural product consumption maintained overall growth, with continuous optimization and upgrading of the consumption structure.** In 2025, grain consumption was 832 million tons, up 0.9% year-on-year; meat consumption increased slightly, reaching 105.30 million tons, up 3.2% year-on-year; vegetable and fruit consumption continued to increase, up 2.2% and 5.4% year-on-year respectively. Regarding consumption structure, per capita grain consumption for food use declined by 0.7% year-on-year; per capita consumption of beef, dairy products, and aquatic products increased to 7.69 kg (up 1.6% YoY), 36.6 kg (up 1.9% YoY), and 24.0 kg (up 4.3% YoY) respectively. **Imports of major agricultural products declined, while trade in traditionally competitive export agricultural products maintained growth.** In 2025, grain imports reached 141.91 million tons (rice converted to paddy equivalent at 70%), down 10.3% year-on-year. Specifically: Corn imports: 2.65 million tons (down 80.6% YoY); Wheat imports: 3.98 million tons (down 64.4% YoY); Rice imports: 3.14 million tons (equivalent to 4.49 million tons of paddy) (up 89.6% YoY); Soybean imports: 111.83 million tons (up 6.5% YoY). Edible vegetable oil imports were 6.94 million tons, down 3.1% year-on-year. Meat imports:

4.82 million tons (down 9.7% YoY), with: Pork: down 9.9% YoY, Poultry (including offal and processed products): down 29.9% YoY, Beef: down 2.5% YoY, Mutton: down 7.5% YoY. Exports of competitive products maintained growth: Vegetable exports: 15.93 million tons (up 6.4% YoY); Fruit exports: 6.891 million tons (fresh equivalent 10.98 million tons) (up 4.4% YoY); Aquatic product exports: 4.582 million tons (up 7.5% YoY). **Agricultural product prices experienced more declines than increases, with overall weak performance.** In 2025, annual average prices of the three major staple grains were stable with a slight decline; the CAMES Grain Price Index was 100.39, down 3.22 points year-on-year. Domestic soybean prices operated at low levels due to overall ample market supply and slightly lower-than-expected protein content in the new crop. Cotton prices fluctuated downward under pressure from strong supply and weak demand. Sugar prices declined overall due to the combined effect of domestic production recovery growth and transmission of international sugar price trends. Prices of livestock products such as pork, beef and mutton, eggs, and milk generally trended weaker. Soybean oil, rapeseed oil, and palm oil prices rose overall driven by international markets. Fruit prices increased somewhat, operating at relatively high levels overall.

In 2026, new progress will be made in comprehensive rural revitalization and agricultural and rural modernization. The overall effectiveness of agricultural technological innovation will continue to improve, the development of new quality agricultural productive forces will accelerate, and agricultural quality and efficiency will significantly increase. The capacity for ensuring stable production and supply of grains and other major agricultural products will be further consolidated, with synergistic improvement in comprehensive agricultural production capacity and quality and efficiency. In 2026, farmers' enthusiasm for growing grain and local governments' focus on grain production will continue to rise. By promoting the integrated use of high-quality farmland, improved seeds, advanced

machinery, and modern farming practices, grain production is expected to maintain a stable growth trend, with the annual grain sown area estimated at 119 million hectares, unchanged from the previous year. Grain yield is projected to improve to 6,000 kg/ha, driving total grain output to 716 million tons, up 0.2% year-on-year. Soybean output is expected to reach 21.08 million tons, up 0.8% year-on-year. Rapeseed and peanut production will continue to increase, with total annual oilseed output projected at 42.04 million tons, up 2.6% year-on-year. Due to adjustment and reduction in cotton sown area, cotton production is expected to decrease by 7.8% year-on-year. Owing to steady yield improvement and planting structure optimization, sugar output is expected to increase by 12.3% year-on-year. Affected by the adjustment and reduction in the breeding sow inventories, pork production will decrease to 58.70 million tons, down 1.1% year-on-year. Due to reduced inventories, especially breeding female livestock, beef and mutton production is expected to decline by 4.4% and 1.2% respectively. Driven by improved breeding efficiency, dairy and aquatic product outputs are expected to maintain growth, reaching 42.20 million tons and 78.38 million tons, up 1.2% and 2.4% year-on-year respectively. Vegetable and fruit market supplies will be ample, with output expected to increase by 0.4% and 1.5% respectively. **Agricultural product consumption will grow slowly, with new consumption formats and scenarios emerging at an accelerated pace.** Grain consumption will be stable with a slight decrease, down 0.2% year-on-year; Edible oilseed consumption will increase marginally, up 0.2% year-on-year; Meat consumption will remain basically flat year-on-year; Poultry egg and dairy consumption will maintain growth, up 1.5% and 0.6% year-on-year respectively; Vegetable and fruit consumption will continue to grow, up 0.6% and 1.8% year-on-year respectively. Edible vegetable oil consumption will focus more on functionality and differentiation, with overall consumption down 0.2% year-on-year. Breakthroughs in soybean deep processing technology and the optimization and upgrading of the entire industry chain will broaden application scenarios and product functionality development, driving edible consumption up 0.6% year-on-year.

The application of liquid milk and dry dairy products in new channels such as catering, baking, and tea beverages will expand dairy consumption scenarios, driving consumption up 0.6% year-on-year. **Coordination between agricultural trade and production will improve, and exports of traditionally competitive agricultural products are expected to continue growing.** Grain imports will be relatively stable, with soybean imports expected to decrease by 6.1% year-on-year. Total meat imports will decline, expected to decrease by 0.3% year-on-year, with imports of pork, beef, and mutton decreasing by 8.2%, 3.9%, and 9.1% year-on-year respectively, while poultry meat imports increase by 29.4% year-on-year. Dairy imports will decline slightly, down 4.1% year-on-year. Exports of vegetables, fruits, and aquatic products, which possess comparative advantages, will continue to grow, expected to increase by 6.4%, 5.0%, and 3.9% year-on-year respectively. **Agricultural product prices will remain generally stable, with most varieties trending stable initially then rising within the year.** Supported by policy underpinnings and an overall loose supply-demand balance, rice, wheat, and soybean prices are expected to remain generally stable, while corn prices are expected to trend steadily upward due to strong feed and deep processing demand. Oilseed prices will be generally stable, and sugar prices will stabilize within the range of 5,500–6,000 yuan/ton. Live hog prices will fluctuate at low levels in the first half of the year before recovering in the second half of the year due to substantial supply contraction, expected within the range of 10–14 yuan/kg. Poultry meat prices will remain low in the first half of the year before stabilizing and rebounding in the second half of the year as the adjustment and reduction in production capacity and export growth drives demand. Beef and mutton prices will gradually rise as the supply-demand relationship tightens, with expected average market prices around 73 yuan/kg and 71 yuan/kg respectively. Affected by the continued reduction in dairy cow inventory combined with mild demand recovery, milk prices are expected to stabilize and enter a moderate upward channel in the second half of the year. Vegetable and fruit prices will continue to be characterized mainly by seasonal fluctuations.

Over the next decade, a large-scale modernized agricultural industry will be basically established, significant achievements will be made in building up China's strength in agriculture, decisive progress will be made in comprehensive rural revitalization, and agricultural and rural modernization will be essentially realized. The comprehensive production capacity for grain and key agricultural products will be significantly enhanced, the diversified food supply system will be further improved, and the overall efficiency and competitiveness of agriculture will be markedly increased. Supported by strict adherence to the cropland protection system and improved mechanisms for ensuring grain planting profitability, the total grain sown area will remain generally stable with a slight increase, projected at 120 million hectares by 2035. With accelerated construction of high-standard farmland, in-depth implementation of the seed industry revitalization action, and deep penetration of modern technologies such as smart agricultural machinery, the Internet of Things, big data, and artificial intelligence, agricultural productivity will achieve a breakthrough leap. Over the next decade, grain yield is forecast to increase by 6.3%, with corn and soybean yields projected to reach 7,275 kg/ha and 2,610 kg/ha respectively. Large-scale yield improvement will drive a steady increase in grain output, with total grain production expected to reach 753 million tons by 2035, representing an average annual growth rate of 0.7% compared to the baseline period (2023–2025 three-year average, same applies hereafter). Corn and soybean outputs are projected to grow at average annual rates of 1.0% and 4.5% respectively. Total meat output will generally trend stable with slight growth, with poultry, beef, and mutton production growing at average annual rates of 2.3%, 0.6%, and 0.8% respectively, while pork output decreases at an average annual rate of 0.5%. Poultry egg, dairy, and aquatic product outputs will maintain steady growth trends, with average annual rates of 0.6%, 2.0%, and 1.5% respectively. Vegetable and fruit production will continue to grow, at average annual rates of 0.5% and 0.9% respectively. **Agricultural product consumption will gradually stabilize, with demand for green and premium products continuing to**

be unleashed. Over the next decade, as residents' income levels rise and consumption scenarios continuously expand, agricultural product consumption will continue to upgrade, with trends toward high-quality, healthy, diversified, and personalized consumption becoming increasingly prominent. Total grain consumption will peak in 2032 before declining gently. Meat consumption will generally trend slightly upward, with pork consumption declining modestly at an average annual rate of 0.7%; poultry consumption increasing steadily at an average annual rate of 1.9%; and beef and mutton consumption first declining then increasing, with average annual rates of 0.7% and 0.9% respectively. Dairy, aquatic product, and fruit consumption will grow relatively quickly, with average annual rates of 1.6%, 1.5%, and 1.2% respectively. **International competitiveness will continue to improve, with import dependence for bulk agricultural commodities decreasing significantly.** Over the next decade, as China advances high-level opening-up, sources of agricultural imports will become more diversified and stable. Grain imports are on a downward trend, projected at 115 million tons by 2035, down 25.5% from the baseline. Soybean imports will continuously decrease, falling to 82.55 million tons by 2035, down 21.5% from the baseline. Imports of cotton, edible vegetable oil, and sugar will decrease by 28.2%, 28.2%, and 8.7% respectively from the baseline. Vegetable and fruit exports will continue to grow relatively rapidly, with average annual rates of 3.2% and 8.4% respectively. Dairy product imports will first decrease then increase, while aquatic product export growth slows, with average annual rates of 1.6% and 1.4% respectively. **Agricultural product prices will generally trend upward, with the characteristic of premium quality commanding premium prices becoming increasingly evident.** Over the next decade, with continuous improvement in price formation mechanisms, monitoring and early warning systems, and reserve regulation systems, price movements will fully reflect cost changes, supply-demand relationships, and quality differences. Driven by persistently rising production costs for inputs, labor, and land rent, grain prices will show a fluctuating upward trend. For cotton, oilseeds, and sugar, as domestic supply

capacity strengthens, the influence of international markets on domestic prices will weaken. Prices of meat, eggs, dairy, and aquatic products will generally trend upward in fluctuation due to rising breeding costs. The phenomenon of premium quality commanding premium prices will become increasingly evident for grains, oils, livestock products, poultry products, vegetables, fruits, and aquatic products.

Grain: Output growth will outpace consumption growth, and the grain self-sufficiency rate will gradually increase. Over the next decade, China's comprehensive grain production capacity will steadily improve, the grain supply structure will continue to optimize, the capacity to prevent and mitigate major risks and challenges will strengthen, and the level of grain supply security will continuously rise. Grain sown area is expected to remain stable with a slight increase, and yield will steadily rise to 6,285 kg/ha by 2035, representing an average annual increase of 0.6%. Grain output will grow steadily to 753 million tons by 2035, with an average annual growth rate of 0.7%. Grain consumption will initially grow slowly, peak in 2032, then decline gently, reaching 841 million tons by 2035, with an average annual growth rate of 0.1%. The tight balance pattern of grain supply and demand will persist long-term, but pressure to balance production and demand will ease somewhat, with the grain self-sufficiency rate projected to rise to 89.6% by 2035. Grain trade volumes will remain high, and moderate imports will continue to be an important means of meeting domestic grain demand, but grain imports will generally trend downward, projected at 115 million tons by 2035, an average annual decrease of 2.9%.

Rice: Production will remain basically stable, while consumption will trend stable to declining. Over the next decade, rice sown area will decrease slightly while yield steadily increases to 7,515 kg/ha. Total production will remain generally stable, expected at 207.30 million tons by 2035, down 0.2% from the baseline. Rice consumption will trend stable with a slight decrease, remaining above 190 million tons. The market will have a slight surplus, ensuring absolute security of staple food supply.

Affected by factors such as declining total population and adjustments in residents' dietary structure, rice consumption for food use will decline year by year, projected at 148.80 million tons by 2035, an average annual decrease of 0.4%. Global rice supply and demand will remain generally ample. As the quality and overall competitiveness of domestic rice improve, rice imports will decrease year by year, while exports show a growing trend. Imports are projected at 0.95 million tons (equivalent to 1.36 million tons of paddy) by 2035, an average annual decrease of 9.1%; exports are projected at 4.20 million tons (equivalent to 6.00 million tons of paddy), an average annual increase of 11.0%.

Wheat: Production will increase slightly, consumption will decrease, and imports will stabilize with a downward trend. Over the next decade, the state will intensify efforts to implement the new round of 100-billion-kilogram grain production capacity enhancement action. Wheat yield improvement, as a core component of grain and oil crop yield enhancement, will be incorporated into key action tasks, becoming a crucial measure for ensuring absolute staple food security. Wheat sown area will stabilize around 23.00 million hectares. By 2035, wheat production is expected to reach 140.76 million tons, with an average annual growth rate of 0.1% from the baseline. During the outlook period, wheat consumption for food use will decline slightly, feed consumption will increase slightly, industrial consumption will increase, and seed use and wastage will decrease. Total wheat consumption will generally show a stable to slightly decreasing trend, projected at 140.47 million tons by 2035, an average annual decrease of 0.03% from the baseline. As domestic wheat develops synchronously in terms of total volume security and quality upgrading, wheat imports will stabilize with a downward trend, projected at 4.11 million tons by 2035, an average annual decrease of 7.6% from the baseline.

Corn: Production will continue to grow, consumption will increase steadily, and imports will remain within the tariff-rate quota. Over the next decade, with

intensified implementation of the new round of 100-billion-kilogram grain production capacity enhancement action, continuous improvement of agricultural infrastructure, and integrated promotion of high-quality farmland, improved seeds, advanced machinery, and modern farming practices, corn sown area is expected to remain generally stable, ranging between 44.93 million and 45.07 million hectares. By 2035, yield is projected to increase to 7,275 kg/ha, an average annual growth of 1.0% from the baseline. Corn output will reach 327 million tons, an average annual increase of 1.0%. Consumption is projected at 326 million tons by 2035, an average annual increase of 0.4%, with corn consumption for food and industrial use growing steadily and feed consumption stabilizing with a slight decrease. As domestic corn output increases year by year, the production-consumption gap will continue to narrow, reducing rigid demand for imported corn. Imports are projected at 3.60 million tons by 2035, an average annual decrease of 13.0%.

Soybeans: Production will continue to grow, consumption will stabilize with a decline, and imports will decrease year by year. Over the next decade, policy support and technological progress will drive area expansion and yield increases. By 2035, sown area is projected at 12.37 million hectares, yield at 2,610 kg/ha, and output at 32.33 million tons, representing average annual growth rates of 1.8%, 2.7%, and 4.5% respectively from the baseline. Total consumption will stabilize with a slight decline. Affected by regulation of hog production capacity and diversification of protein sources, crushing consumption will decrease, while edible consumption will increase slightly. Consumption is projected at 107.73 million tons by 2035, an average annual decrease of 0.3%. Imports are on a downward trend, the self-sufficiency rate will increase, and diversified channels will enhance supply chain security. Imports are projected at 82.55 million tons by 2035, an average annual decrease of 2.4%. Domestic prices will trend steadily upward, while international prices will fluctuate within a range.

Oilseeds: Production will increase, imports will decrease, and consumption will

trend downward. Looking ahead to the next decade, oilseed area will steadily increase, with coordinated development of multiple oilseed crops. The integrated application of high-quality farmland, improved seeds, advanced machinery, and modern farming practices will drive yield growth. Oilseed supply will diversify, and output will increase substantially. By 2035, oilseed production is projected at 52.86 million tons, an increase of 32.8% from the baseline, growing at an average of 2.9% annually. Dependence on imports will decrease, with projected imports of oilseeds and edible vegetable oils at 90.15 million tons and 5.72 million tons respectively by 2035. Residents' demand for functional and differentiated edible vegetable oils will grow, but total consumption volume will decrease. Edible vegetable oil consumption is projected at 37.23 million tons by 2035, down 2.5% from the baseline. Over the next decade, domestic edible vegetable oil consumption is expected to decline at an average annual rate of 0.3%, compared to an average annual growth of 1.8% over the past decade.

Cotton: Production will remain flat with a slight decline, consumption and imports are on a downward trend. Over the next decade, affected by multiple factors such as policy-driven adjustments to cotton planting area in Xinjiang and the shift from quantitative expansion to quality and efficiency enhancement in cotton cultivation, cotton planted area will show a moderate declining trend. During the outlook period, cotton yield will steadily increase due to technological advancements. Under the influence of policies such as cotton quality subsidies, quality will continue to improve. Cotton production is projected at 6.01 million tons by 2035, an average annual decrease of 0.2%. Affected by multiple factors such as the offshoring of the textile industry, substitution by non-cotton fibers, and changes in the external trade environment, cotton consumption is expected to decline slowly. Cotton consumption is projected at 7.33 million tons by 2035, an average annual decrease of 0.4%. Cotton imports will gradually decrease as the domestic production-consumption gap narrows. Import sources will continue to diversify, with Brazil, the United States, and Australia as the

main sources, while simultaneously expanding emerging supply markets in Asia and Africa. Cotton imports are projected at 1.35 million tons by 2035, an average annual decrease of 3.3%.

Sugar: Production and consumption will maintain a growth trend, imports will decline slightly. Over the next decade, driven by factors such as mechanization upgrades in major producing areas, policy support for core production zone protection, promotion of superior seed breeding, and the spread of standardized planting techniques, the area planted to sugar crops will exhibit a growing trend. Yield will continue to increase, and sugar output will grow relatively quickly, projected to reach 13.00 million tons by 2035, with an average annual growth rate of 2.5%. Sugar consumption will show a moderate growth trend, projected at 16.20 million tons by 2035, with an average annual growth rate of 0.4%. The sugar imports will exhibit a gradual downward trend, projected to fall to 4.00 million tons by 2035, an average annual decrease of 0.9%.

Vegetables: Production will increase steadily, and consumption structure will continue to optimize. Over the next decade, vegetable planted area will remain basically stable, with output increasing slightly and growth rates gradually slowing. By 2035, production is projected at 897.87 million tons, an average annual growth of 0.5% from the baseline, including marketable output of 692.17 million tons, growing at 0.7% annually. Vegetable consumption will grow steadily, with a continuously optimizing structure. By 2035, consumption is projected at 668.45 million tons, an average annual growth of 0.6% from the baseline, with the share of fresh consumption increasing from 44.3% in 2026 to 45.0% in 2035. The scale of vegetable imports and exports will continue to expand, maintaining a long-term net export position. By 2035, exports are projected at 20.17 million tons and imports at 0.67 million tons. Vegetable prices will exhibit distinct seasonal fluctuation characteristics, with a long-term moderate upward trend.

Potatoes: Production will generally maintain growth, consumption will trend

stable with a slight increase. Over the next decade, the planting area of potatoes is projected to expand to 5.613 million hectares by 2035, a 0.2% annual growth. With widespread adoption of virus-free seed potatoes, accelerated promotion of high-yield and high-quality cultivation techniques, and continuous improvement in production specialization levels, potato yield will steadily rise, projected at 17,370 kg/ha by 2035. Potato production will maintain a growth trend, projected at 97.50 million tons by 2035, an average annual growth of 0.2% from the baseline. Potato consumption will trend stable with a slight increase, projected at 94.28 million tons by 2035, a 0.1% annual growth. The import scale is small, generally remaining between 30,000 and 50,000 tons; exports possess competitive advantages, projected at 1.26 million tons by 2035, a 3.0% annual growth.

Fruits: Production and consumption will increase slightly, and trade volume will expand. Over the next decade, the fruit industry will accelerate high-quality transformational development. The orchard area will be relatively stable at about 12.60 million hectares, and the melon area at about 2.25 million hectares. Yield levels will improve, the supply of premium fruits will increase, and the variety structure and supply timing will be further optimized. By 2035, fruit production is projected to reach 375 million tons, a 0.9% annual growth. Fruit consumption demand will continue to increase, with total fruit consumption projected at 369 million tons by 2035, a 1.2% annual growth. This includes direct consumption of 178 million tons (average annual growth of 0.9%) and processing consumption of 76.11 million tons (average annual growth of 4.5%). Fruit import and export volumes will maintain growth trends, with average annual rates of 6.1% and 8.4% respectively; a trade deficit will persist long-term. Rising production costs and overall improvement in fruit quality will drive fruit prices upward with fluctuations.

Meat: Production and consumption will both trend stable with slight growth, and exports will continue to grow. During the outlook period, China's livestock and

poultry breeding and propagation systems will continue to improve, smart farming and standardized breeding will accelerate, and the capacity for ensuring stable production and supply of livestock products will continue to strengthen. Meat production will show stable growth, projected at 104.91 million tons by 2035, with a 0.6% annual growth. Affected by factors such as declining total population and an aging population, meat consumption will show a slow growth trend, projected at 107.33 million tons by 2035, a 0.4%e annual growth. Meat import will trend stable with a slight increase, which is still lower than the base period. It is estimated that the import will be 5.29 million tons in 2035, a 0.2% annual decrease. Meat exports will maintain growth, projected at 2.87 million tons by 2035, with a 10.0% annual growth .

Pork: Production will trend downward, consumption will stabilize with a decline, and imports will decrease. Over the next decade, pork production will trend stable to declining, projected at 55.11 million tons by 2035, a 0.5% annual decrease. The industry will comprehensively shift from quantitative growth to quality and efficiency improvement, resulting in a more secure pork supply guarantee capacity. Affected by multiple factors including declining total population, aging demographics, and substitution by other meat products, pork consumption will stabilize with a decline, projected at 55.35 million tons by 2035, a 0.7% annual decrease. Influenced by enhanced stability of domestic pork supply, improved production costs and quality competitiveness, and declining consumption demand, imports will decrease and exports will increase. By 2035, imports are projected at 0.50 million tons and exports at 0.26 million tons.

Poultry Meat: Production and consumption growth will slow, and trade will achieve a surplus. Over the next decade, poultry meat production and consumption will continue to increase, with overall slowing growth rates, and export growth will outpace import growth. By 2035, production is projected at 33.80 million tons, a 2.3% annual growth. With changes in residents' consumption structures and concepts, poultry

meat consumption will continue to grow, projected at 32.59 million tons by 2035, a 1.9% annual growth. Imports of fresh/chilled/frozen products will gradually decrease, while imports of processed poultry meat will gradually increase. By 2035, imports are projected at 1.27 million tons, a 2.4% annual growth. The international competitiveness of poultry meat products will continue to strengthen, leading to relatively rapid export growth. By 2035, exports are projected at 2.48 million tons, an increase of 1.52 million tons from the baseline, representing approximately 1.6 times growth.

Beef and Mutton: Production will first decline then increase, consumption growth will slow. Over the next decade, with the application of technologies such as improved breeding, smart farming, and integrated disease prevention and control, the efficiency of cattle and sheep farming will continuously improve. However, initially affected by the decline in breeding female livestock, beef and mutton production will decrease somewhat before resuming growth. By 2035, beef and mutton production are projected at 8.24 million tons and 5.57 million tons, with average annual growth rates of 0.6% and 0.8% respectively. As residents' income levels grow and health awareness strengthens, demand for beef and mutton consumption will continue to increase. By 2035, beef and mutton consumption are projected at 11.30 million tons and 6.02 million tons, with average annual growth rates of 0.7% and 0.9% respectively. The beef and mutton production-consumption gap will persist long-term, with imports declining in the short term but increasing somewhat over the long term. By 2035, beef and mutton imports are projected at 3.06 million tons and 0.45 million tons, with average annual growth rates of 0.9% and 1.7% respectively.

Poultry Eggs: Production and consumption will maintain modest growth, and exports will grow steadily. During the outlook period, as egg poultry farming enterprises transition towards precision and intelligent operations, their cost control and risk resilience capabilities will steadily improve. The overall competitiveness and development quality of the industry will continue to improve, leading to steady growth

in poultry egg production. By 2035, poultry egg production is projected at 37.85 million tons, a 0.6% annual growth. Poultry egg consumption will be characterized by low total volume growth but accelerated structural upgrading, with steady growth in market demand for branded and functional egg products. By 2035, consumption is projected at 37.46 million tons, a 0.6% annual growth. The scale of poultry egg exports will expand, and the international market competitiveness and influence of egg products will gradually increase. By 2035, exports are projected to increase to 0.24 million tons, a 2.8% annual growth.

Dairy Products: Production and consumption will maintain growth, imports will first decline then increase. During the outlook period, production capacity on the supply side will be continuously optimized, yield levels will constantly increase, and the comprehensive dairy supply capacity will gradually strengthen. By 2035, dairy production is projected to reach 51.17 million tons, a 2.0% annual growth. With the continuous strengthening of residents' awareness of nutrition and health and the ongoing expansion of consumption scenarios, the potential for dairy consumption will continue to be released. By 2035, dairy consumption is projected at 67.64 million tons, a 1.6% annual growth, with per capita edible consumption reaching 43.6 kg. As the consumption structure continues to upgrade, demand for high-quality and diversified dairy products will increase. Imports will show a trend of first declining then growing, projected at 19.37 million tons by 2035, a 1.6% annual growth.

Aquatic Products: Production and consumption will increase slightly, imports will stabilize with growth. Over the next decade, aquatic product output will grow steadily, with the proportion of aquaculture production expanding. By 2035, aquatic product output is projected at 85.30 million tons, a 1.5% annual growth. The proportion of aquaculture production in total aquatic product output will reach 85.9% by 2035, an increase of 3.7 percentage points from the baseline. Consumption will increase slightly, with processed consumption growing faster than edible consumption. By 2035,

consumption is projected at 88.53 million tons, a 1.5% annual growth. Aquatic product imports will stabilize with growth, projected at 8.08 million tons by 2035, a 1.6% annual growth. Exports still have some room for growth, projected at 4.85 million tons by 2035, a 1.4% annual growth.

Feed: Industrial feed production and consumption will grow steadily, and raw material security capacity will be significantly enhanced. Over the next decade, the growth rate of livestock and poultry farming scale will slow down. The feed industry will enter a new stage of high-quality development. Technological innovation will drive improvements in feed product quality and efficiency. The penetration rate of industrial feed will continue to rise. By 2035, industrial feed production is projected to reach 410 million tons, an increase of 26.6% from the baseline, with a 2.4% annual growth. The output of formula feed will continue to increase, with its proportion rising to 96.9%. Industrial feed consumption will reach 407 million tons by 2035, an increase of 25.7% from the baseline, a 2.4% annual growth. Hog feed consumption accounts for a relatively large proportion, while consumption of feed for meat poultry, egg poultry, aquaculture, and ruminants will maintain growth momentum. During the outlook period, feed ingredient security capacity will strengthen. As farming levels improve, feed conversion rates will increase, market supply will be ample, and prices for major feed ingredients will trend stable to lower.