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Report Highlights:

China was the world's second largest importer of food and agricultural products in 2025, at \$207.4 billion. It has a robust and dynamic food processing industry with more than 100,000 registered food processing companies. The food service sector grew by 3.2 percent to \$812 billion in 2025. Due to the Chinese Government's retaliation against U.S. agriculture, the United States' exports of consumer-oriented products to China dropped over 30 percent in 2025. Nevertheless, several product categories such as distilled spirits, dairy products, hops, and cranberry juice showed resilience or have even achieved significant sales growth in China despite elevated tariffs on U.S.-origin goods. U.S. food ingredients, perceived as superior quality and high safety standards have great growth potential in China's market.

Executive Summary:

China’s GDP reached \$19.6 trillion (RMB 140.2 trillion) in 2025, up 5 percent from 2024, according to National Bureau of Statistics. It continued to be the world’s second-largest importer of agricultural products in 2025, with import value at \$207.4 billion. For consumer-oriented products, China’s imports from the United States declined over 30 percent in 2025 to \$4.97 billion, making the United States the 6th largest supplier, 2 places down from 2024.

Consumer-Oriented Agricultural Imports

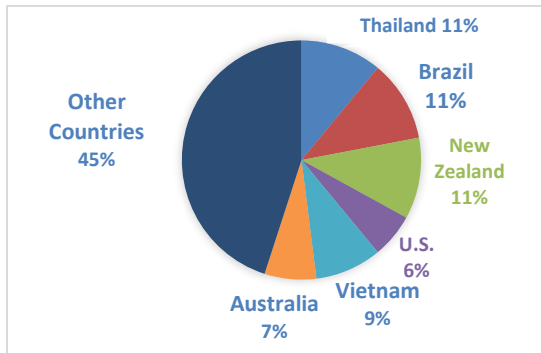


Chart 1: Top Exporting Countries to China
Source: Trade Data Monitor, LLC

Food Retail Industry

China’s total retail sales of consumer goods in 2025 rose 3.7 percent to exceed \$7 trillion, but the Bureau of Statistics has not published an official number on food retail sales for the year, except saying that it has increased by 9.3 percent from the previous year. A survey of more than 30,000 outlets conducted by China Chain Store and Franchise Association under 68 supermarket chains nationwide shows that 50 percent surveyed outlets recorded sales growth while 42 percent recorded decline in 2025.

Food Processing Industry

According to the Ministry of Agricultural and Rural Affairs, China’s food/agricultural processing industry is comprised of 100,000 registered companies in 2025, with revenues estimated at \$2.5 trillion. Specifically, pre-cooked food and prepared meals is a rapidly rising sector with market value estimated at up to \$116.2 billion in 2025.

Food Service Industry

China’s food/catering service sales reached \$812 billion (RMB5.8 trillion) in 2025, up 3.2 percent from 2024. Chain operations continued to rise, accounting for 25 percent of the food service sector, roughly 2 percentage points higher than in 2024.

Quick Facts CY 2025

Imports of Consumer-Oriented Products
\$84.4 billion

List of Top 10 Growth Products in China

1) Fresh Fruit	2) Beef & Beef Products
3) Dairy Products	4) Soup & Other Food Preparations
5) Pork & Pork Products	6) Processed Vegetables
7) Tree nuts	8) Meat Products NESOI*
9) Processed fruit	10) Poultry meat & products (ex. eggs)

*NESOI – not elsewhere specified or indicated. Includes offal, sausage products, etc.

Food Industry by Channels (\$ billion)

Food Retail Industry	Unpublished
Food Service-HRI	\$812
Food Processing	\$2,521
Agriculture Exports	\$104.2

Top 10 Supermarket Chains in China (by sales)
Walmart/Sam’s Club, RT-Mart, Freshippo, Yonghui (YH), Wumart, Lianhua, CR-Vanguard, Jiajiayue, Zhongbai Supermarket, Qiandama
(Source: China Chain Store and Franchise Association)

GDP/Population
Population: 1.405 billion
GDP: \$19.6 trillion
GDP per capita: \$13,950

Source: Trade Data Monitor, LLC, National Bureau of Statistics, and China Chain Stores & Franchise Association

Strengths/Weaknesses/Opportunities/Threats

Strengths	Weaknesses
U.S. ingredients are widely perceived as high-quality, safe, and consistent in China.	Trade relations subject to instable, sometimes strained bilateral relations.
Opportunities	Threats
Expanding middle-class consumers are seeking high-quality and premium food products.	Intense competition from other countries eyeing China’s market.

Section I: Market Overview

The National Bureau of Statistics announced that China’s GDP grew by 5 percent in 2025, reaching \$19.6 trillion, while total retail sales of consumer goods increased 3.7 percent year-on-year to exceed \$7 trillion, indicating a gradual recovery in consumer demand following the pandemic. Although China remained the world’s second-largest importer of food and agricultural products, total imports declined by 3.6 percent to \$207.4 billion, reflecting broader economic pressures. At the same time, imports of consumer-oriented agricultural products rose by 4.6 percent to \$84.4 billion, highlighting resilient demand for higher-value food products. This divergence aligns with shifting consumer behavior: while economic uncertainty has led some consumers – particularly in North China – to reduce discretionary food spending by dining at home or bringing lunch to work for cost savings, overall consumption has become more selective and quality-driven. Meanwhile, online retail sales continued to outperform, growing 8.6 percent to \$223.7 billion, with online sales of food, clothing, and daily necessities surging 14.5 percent, underscoring the accelerating shift toward e-commerce channels.

According to the Ministry of Agriculture and Rural Affairs, China’s food and agricultural processing sector comprised more than 100,000 registered companies in 2025, generating estimated revenues exceeding \$2.5 trillion (approximately RMB 18 trillion). China’s imports of consumer-oriented agricultural products from the United States declined by more than 30 percent in 2025 amid volatile bilateral trade relations throughout the year. As a result, the United States ranked as the sixth-largest supplier of consumer-oriented products, two places down from 2024. The decline was particularly pronounced in tree nuts and beef/beef products – where imports from the United States fell by nearly 80 percent and more than 60 percent respectively compared to 2024.

Advantages and Challenges

ADVANTAGES	CHALLENGES
Ingredients from the United States are widely regarded as high-quality, safe, and consistent. This reputation is particularly important for food processors seeking reliable ingredients with standardized specifications.	Trade frictions between the United States and China continue to affect agricultural trade. Periodic disputes can lead to retaliatory tariffs, import restrictions, or heightened regulatory scrutiny, creating uncertainty for U.S. exporters.
The United States benefits from large-scale agricultural production, modern logistics, and well-developed supply chains. These factors enable U.S. exporters to provide stable supply volumes and consistent product characteristics,	Major agricultural exporters such as Brazil, EU, Australia, and New Zealand compete aggressively in the China market. In some cases, preferential trade agreements or geographic proximity give these suppliers pricing or logistical advantages.

<p>U.S. exporters benefit from support from USDA’s Foreign Agricultural Service offices in China, which conduct market promotion programs, and provide technical assistance to importers and industry stakeholders in China.</p>	<p>China’s food safety, labeling, and import registration requirements can change frequently and may be implemented differently across agencies. Compliance with evolving regulations can increase costs and administrative burdens for U.S. exporters.</p>
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Section II: Roadmap for Market Entry

Entry Strategy

The following entry strategy is recommended for new-to-China exporters seeking to explore the China market:

1. **Attend trade shows in China:** This allows the potential exporter to gain first-hand market information, gauge interest in your product(s), observe competitors, and meet potential partners. [China Trade Shows and Conferences Report 2026](#) highlights vetted 2026 trade shows in China, including three USDA-endorsed trade shows: Food Ingredients China (FIC), SIAL China (Shanghai), and Food and Hospitality China (FHC), as well as other influential trade shows in sectors including bakery, fishery and seafood, meat, pet food, etc.
2. **Participate in State Regional Trade Group (SRTG) activities:** Regularly, SRTG organizes trade missions to China, which often include site visits to processing facilities, in-person meetings with importers, exhibiting under a unified USA pavilion at trade shows, and attending exporter training and briefing events.
3. **Reach out to Departments of Agriculture of your state and state trade promotion offices:** They often organize trade missions and activities like those organized by the SRTGs.
4. **Utilize China’ social media to reach consumers:** China's social media platforms, such as Douyin, Xiaohongshu (Red Note), and Kuaishou, are rapidly evolving and becoming key channels for consumer information and purchasing decisions. These platforms are tightly integrated with shopping and livestreaming, offering unique opportunities for U.S. agricultural exporters to reach Chinese consumers. For further info, please refer to GAIN report [Navigating China’s Social Media Landscape](#).

Import Procedure

The Foreign Agricultural Service publishes up-to-date reports on the Global Agricultural Information Network ([GAIN](#)) system, drafted by FAS staff on-the-ground around the world. The following FAS GAIN reports provide updated guidance to exporters on market access, market trends, as well as market regulations of China:

- The [Exporter Guide 2025](#) provides market access information, entry strategies, import procedures, and market trends. The 2026 report will be out in April 2026.
- The [Food and Agricultural Import Regulations and Standards \(FAIRS\) Country Report 2025](#)

provides comprehensive information on product-specific regulations and standards, including product testing, labeling, packaging, and production facility registration requirements. The 2026 report will be out in April 2026.

- The [FAIRS Certificate report](#) offers a brief outline of the import certificates and other documents needed to import U.S. products into China. The 2026 report will be out in April 2026.

Facility Registration

Exporters planning to ship food and agricultural products to China should confirm that their production facilities meet all registration requirements administered by China's [General Administration of Customs](#) (GACC). U.S. companies are advised to follow export procedures established by the appropriate U.S. regulatory authorities: [FSIS](#), [APHIS](#), and [FDA](#), when preparing shipments for the China market. In most cases, processed food manufacturers must complete registration through [China Import Food Enterprises Registration](#) (CIFER) system. However, exporters of meat, poultry, dairy products, infant formula, and seafood should coordinate directly with FDA or FSIS to determine product-specific compliance steps.

In October 2025, GACC announced that [Decree 280](#) will replace Decree 248 on June 1, 2026. CIFER will remain the registration system for products subject to Decree 248 and Decree 280. In addition, GACC recently [announced](#) additional information regarding the catalog of food categories that require competent authority assistance when registering and which product categories were ineligible for automatic renewal. Exporters of grains and oilseeds, tubers, and pulses; fresh fruits and vegetables; pet foods, compound and mixed feed, and feed ingredients and additives; live animals, fibers, and genetics; and some aquatic products must [register](#) their facilities with GACC's Department of Animal and Plant Quarantine. Exporters are encouraged to work closely with FAS, FSIS, FDA, and APHIS to ensure all registrations are completed prior to export.

Distribution Channels

Imported food products in China are distributed through a mix of traditional and modern channels that increasingly overlap. Conventional pathways include importers and distributors supplying supermarkets, hypermarkets, food stores, and foodservice operators, which remain important for broad market coverage and cold-chain logistics. At the same time, digital channels are gaining increasing shares as cross-border and domestic e-commerce platforms enabling overseas brands to enter the market with lower upfront costs and reach consumers directly. Livestreaming sales, and community group-buying further expand market access, particularly for packaged foods and premium products. Many importers now adopt hybrid distribution models that combine offline retail presence with online stores to strengthen brand visibility and manage inventory more efficiently.

Market Structure and Major Segments in the Food Processing Industry

China traditionally splits food processing/production industry into three categories:

- **Food processing:** This refers to primary processing of agricultural produce such as rice milling, flour milling, oil refining, sugar refining, slaughtering, salt processing, feed processing, and aquatic product processing. In 2025 this category is estimated to account for 46 percent of the overall food processing/production industry.
- **Food manufacturing:** This refers to the manufacturing of packaged food, pastries and confections, dairy products, canned foods, condiments, etc. In 2025 this category is estimated to account for 32 percent of the overall food processing/production industry.
- **Beverage manufacturing:** This refers to production of alcoholic drinks (liquor, wine, beer for instance), soft drinks and tea. In 2025 this category is estimated to account for 22 percent of the overall food processing/production industry.

Company Profiles & Company Products

Hurun publishes annual [China Food Industry Top 100](#) List. The list below shows the top 10 in 2025 (by market value):

China Top 10 Food Processing Companies 2025		
Company Name	Category	Official Website
1. Kweichow Moutai	Liquor	www.moutaichina.com
2. Wu Liang Ye	Liquor	www.wuliangye.com.cn
3. Nongfu Spring	Beverage	www.nongfuspring.com.cn
4. Shanxi Fenjiu	Liquor	www.fenjiu.com.cn
5. Haday Flavoring (Haitian Flavoring)	Condiments	www.haday.com
6. Muyuan Foodstuff	Pork	www.muyuanfoods.com
7. Luzhou Laojiao	Liquor	www.lzlj.com
8. Yili Dairy	Dairy	www.yili.com
9. Jinlongyu	Edible oil	www.jinlongyu.cn
10. Wens Foodstuff	Meat, eggs	www.wens.com.cn

Source: 2025 Hurun China Food Industry Top 100

Sector Trends

1. ***Emergence of pre-cooked food/prepared meals market:*** The manufacturing of pre-cooked food/prepared meals has emerged as a prominent trend in the food processing industry in recent years. Multiple cities in various provinces across China have announced plans to build pre-cooked food production hubs or have established industrial parks dedicated to pre-cooked food production – notably Zhuhai and Zhanjiang in Guangdong Province, Weifang in Shandong Province, and Luohe in Henan Province. Market size of the pre-cooked food sector is estimated between \$86.5 billion to \$116.2 billion in 2025, depending on the source.
2. ***Consumers increasingly health-conscious:*** Chinese consumers are increasingly prioritizing healthier food options—favoring low-sugar, low-salt, high-protein, and functional ingredients such as probiotics and dietary fiber—prompting manufacturers to reformulate products and expand health-oriented offerings, including nutrition-fortified and organic lines, which are outpacing traditional packaged foods. This trend was evident at the Food Ingredients China (FIC) Expo in March, where strong interest from food processors centered on natural, low-calorie, and innovative ingredients, particularly alternative sweeteners such as stevia and monk fruit extracts. These ingredients are widely perceived as healthier and are being actively incorporated into beverages, bakery, dairy, and other processed foods, with an emphasis on reduced sugar content, clearer health labeling, and targeted benefits such as weight management and digestive health.
3. ***Flavor innovation and product differentiation:*** To stand out from competitors, flavor innovation is becoming a core strategy for food processors and retailers. This means adopting regional, ethnic, and unconventional taste profiles to attract consumers. Examples include Tom Yum Kung-flavored potato chips and wasabi-flavored latte. Industry reports highlight flavor innovation as a major trend for 2026 with companies using unique seasonings and profiles to stand out.
4. ***High protein and functional ingredients:*** Chinese food processors increasingly focus on high-protein ingredients, such as whey, pea, and other plant-based proteins. These ingredients are increasingly being used to cater to the rising consumer demand for healthier and nutrition-enriched foods. Many of the products displayed at FIC highlighted high nutritional value, reduced sugar, low fat, and functional fortification, underscoring the broader trend of consumers seeking health-conscious and wellness-oriented lifestyles.
5. ***Increasing role of e-commerce platforms and social media in retail:*** E-commerce platforms and social media have become central to China’s food retail landscape, and profoundly reshaped how consumers discover, purchase, and interact with food products. In 2025, online retail sales in China grew 8.6 percent to approximately \$223.7 billion, versus a 3.7 percent growth in overall total retail. Platforms such as Douyin (China’s TikTok), Red Note, and Pinduoduo leverage content, recommendations, and interactive livestreams to engage shoppers in ways that traditional e-commerce cannot, boosting impulse purchases of packaged food and beverages.

Section III: Competition

South American countries – notably Brazil and Argentina – dominate bulk commodities such as soybeans and oilseeds, while the EU, New Zealand, and Australia maintain strong positions in dairy ingredients and specialty food products. ASEAN suppliers also expanded their presence in processed foods and specialty ingredients due to geographic proximity and favorable trade arrangements with China. Vietnam, for instance, increased exports to China by nearly 30 percent in consumer-oriented agricultural commodities in 2025, becoming China’s 4th largest supplier. China also progressively expanded import access for a range of agricultural products from multiple African countries in 2025, allowing items such as soybean meal, peanuts, cashews, and other farm products from Ethiopia, Congo, and Gambia to enter the Chinese market at zero-tariff.

Some Chinese domestic producers are also moving into premium market segments traditionally dominated by imports. They are increasingly adapting to evolving consumer demand by producing higher-quality domestic ingredients that can partially substitute for imports. For example, Xuelong Foodstuff Company in Dalian, Liaoning Province produces Wagyu-style beef using Japanese breeding and feeding techniques. It is used by upscale restaurants in China as a domestic alternative to imported Wagyu-type beef. Haoyue Group in Changchun, Jilin Province, utilizes fully imported German equipment and adheres to strict quality controls to produce grain-fed, premium halal beef, including high-end Wagyu-style beef.

U.S. exporters remain competitive in several ingredient segments due to strong reputations for quality, safety, and consistent supply, particularly in products such as tree nuts, dairy ingredients (e.g., whey and lactose), and certain specialty ingredients used by the food processing industry. However, geopolitical tensions and tariffs have pushed importers to seek alternative origins at times.

Section IV: Best Product Prospects

Category A. Products Present in the Market with Good Sales Potential

Due to volatility in U.S.-China trade relations, China's imports of consumer-oriented agricultural products from the United States dropped over 30 percent in 2025 versus 2024. Yet, a few product categories demonstrated resilience or even achieved significant growth:

Product Category	2025 China imports from United States (million USD)	2025 China imports from World (million USD)	Remarks
Distilled Spirits	\$27.7	\$176.3	Despite heavy tariffs on U.S. goods, imports from the United States grew nearly 44 percent in 2025. Whiskies saw a growth of over 51 percent.
Dairy Products	\$568	\$13,836	United States was only the 6 th largest supplier in China's dairy imports. Despite elevated tariff levels on U.S. goods, imports only declined 1.6 percent, demonstrating U.S. dairy's resilience in the China market.
Cranberry juice	\$1.8	\$2.7	United States was the No. 1 supplier in cranberry juice in 2025 and imports grew by 2.85 percent despite elevated tariffs.
Tree nuts	\$230	\$3,164	Although U.S. direct exports of tree nuts to China dopped nearly 80 percent in 2025, sources indicate that much of U.S. shipments went to Vietnam for processing before re-export to China to mitigate tariffs on U.S.-origin goods. China still has substantial and growing demand for tree nuts.
Hops (Hop cones)	\$21.4	\$78.1	As the world's largest beer producer (by volume), China has substantial demand for hops. Its hops imports in 2025 grew 46 percent, and the United States was the second-largest supplier.

Source: Trade Data Monitor, LLC

In addition to the above list, baking ingredients including wheat (flour), whey, butter, cheese, and tree nuts continue to present growth potential for U.S. exporters as China's bakery sector continues expanding. Its baked food retail market was estimated between \$50 billion to \$83 billion in 2025. Continued growth is expected as China's per-capita baked food consumption remains relatively low in comparison to mature markets like the United States and Japan. For further info on baking ingredients, please refer to [Baking Ingredients Market Update 2025](#).

Category B: Products Not Present in Market with Good Sales Potential

Most products with good sales potential in theory already have market access, but for a variety of reasons the Chinese Government has chosen to restrict their entry into the Chinese market (see Category C).

Category C: Product Not Present due to Significant Barriers

Fresh chilled and frozen beef

Starting in March 2025, China Customs stopped renewing the registration for over 400 U.S. beef export establishments making them ineligible to ship product to China. U.S. beef and beef products exports to China fell by more than 60 percent in 2025, resulting in U.S. fresh and frozen beef largely disappearing from Chinese steakhouses and supermarket shelves. Suppliers such as Brazil, Australia, and Argentina moved quickly to fill the gap, with Australian exports surging by nearly 40 percent in 2025.

New biotech (GMO) crops and crop varieties

According to a 2025 [USTR report](#), the Chinese regulatory approval process for agricultural biotechnology products creates significant uncertainty among developers and traders, slowing commercialization of products and creating adverse trade impacts, particularly for U.S. exports of corn, soy, canola, alfalfa, and potatoes. Despite numerous approvals of domestically developed Chinese seeds developed using biotechnology, foreign developers are prohibited from conducting research, seed production, or cultivation of GE products in China. For more information, see FAS China's recent [Biotechnology and Other New Production Technologies Annual](#).

Chipping Potatoes

Chipping potatoes from Idaho, Oregon, and Washington were among several U.S. agricultural products that received new and expanded access under the U.S.- China Economic and Trade Agreement signed on January 15, 2020. China has strong demand for high quality chipping potatoes, which presents a market opportunity for U.S. potatoes. However, current barriers for U.S. chipping potatoes, such as China's requirements on handling and processing and higher prices, are a disadvantage.

Raw Chicken Paws

China is by far the largest market for U.S. chicken paw exports, but those exports are currently restrained by HPAI restrictions. In 2015, China imposed bans on poultry imports from specific U.S. states affected by avian influenza outbreaks. As of 2026, Most U.S. States continue to face HPAI restrictions imposed by the Chinese Government. Visit [the FSIS Export Library for China](#) to get updated information. To fulfill China's market demand, China may open its market for heat-treated poultry products to more countries. U.S. chicken paw suppliers are encouraged to explore the heat-treated market.

Non-GE, Food-Grade Soybean

Although non-Genetically Engineered (GE) food-grade soybeans can be imported, China follows a zero-tolerance policy toward the presence of biotech in a food-grade soybean shipment. If a trace amount of biotech soybeans is detected, the entire load will be denied entry. Expanding U.S. non-GE food-grade soybeans is contingent upon China approving a low-level presence policy to address incidental contamination.

Section V: Key Contacts and Further Information

Links to other government sources for data

U.S. Department of Commerce: [Country Commercial Guides](#)

Reports on market conditions, opportunities, regulations, and business customs prepared at U.S. Embassies worldwide by the Commerce Department, State Department, and other U.S. agency professionals.

Links to FAS FAIRS and other GAIN reports

- [Food and Agricultural Import Regulations and Standards Country Report 2025](#)
- [Food and Agricultural Import Regulations and Standards Export Certificate Report 2025](#)
- [Exporter Guide \(2025\)](#)

Ministries Responsible for Food Policies and Import Policies

- **The Ministry of Agriculture and Rural Affairs (MARA)**
MARA is the cabinet-level executive department of the State Council that is responsible for agriculture and rural affairs in the country. MARA implements the guiding principles, policies, and decisions of the Communist Party of China's (CCP) Central Committee on work related to agriculture, rural areas, and farmers. <http://english.moa.gov.cn/>
- **General Administration of Customs of China (GACC)**
GACC, the headquarters of China Customs, is a key border agency of the People's Republic of China, with responsibilities of traditional customs, as well as border health checks, inspection, and quarantine for imported and exported animals, plants, and their products, imported and exported food safety, and commodity inspection. <http://english.customs.gov.cn/>

For more information, please contact the following USDA Foreign Agricultural Service offices in China.

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Attachments:

No Attachments