

Voluntary Report – Voluntary - Public Distribution

Date: May 19, 2026

Report Number: CH2026-0059

Report Name: The Northern Frontier of Shenyang Presents Opportunities for US Agriculture Exports

Country: China - People's Republic of

Post: Shenyang ATO

Report Category: Tree Nuts, Food Processing Ingredients, Export Promotion Programs, Market Development Reports

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Report Highlights:

Shenyang, the capital of Liaoning Province, is a regional hub for transportation, advanced manufacturing, and innovation. Although its economy has softened in line with national trends—resulting in a highly price sensitive market and limited exposure to imported food products—urban consumers increasingly appreciate Western-style restaurants and premium agricultural and food products. Most imported items are concentrated in high end retailers and food service outlets, but this segment has strong potential for growth. Despite these headwinds, the city’s food processing sector has shown notable resilience, creating openings for U.S. exporters—particularly in baking ingredients and meat products that can meet steadily rising demand. Effective entry strategies for U.S. suppliers include partnering with local distributors and Liaoning based trading companies, while deploying targeted marketing and instore promotions to build brand visibility and deepen consumer engagement.

Shenyang City Overview



Shenyang, the capital of Liaoning Province and the largest city in Northeast China (population 9 million, 2025), is a vital economic and industrial city. The city's GDP has steadily recovered post-COVID, reaching approximately \$1.26 trillion in 2025, two percent higher than the previous year. This growth is driven a transition to advanced manufacturing, high-tech and service sector development, and moderate recovery in consumer demand.

Shenyang's strategic location as a transportation hub, supported by extensive rail networks and proximity to major ports like Dalian facilitates both domestic and international trade. These logistical advantages establish Shenyang as a critical node for regional

trade, connecting to Dalian and Bohai ports for international shipments, to Beijing and Harbin by rail for domestic distribution, and to Mongolia by rail for Central Asian logistics.

Demographic shifts in Shenyang are reshaping consumption patterns. A growing middle class with rising disposable incomes has fueled preferences for convenient, health-conscious options, and premium food products. Tourism and domestic travel have rebounded strongly from the pandemic. This trend and effort by local government have bolstered demand for food in the hospitality sector. Distributors are responding to these trends by accelerating bulk procurement and online expansion.

Shenyang's investments in cold-chain logistics are boosting the commercial viability of fresh produce and dairy, meeting growing demand for high-quality food. Positioned as a key distribution hub for Northeast China, Shenyang is driving growth in supermarkets and online-to-offline (O2O) fresh-food delivery services, reflecting rising demand for dairy, meat, and processed foods fueled by urbanization and shifting dietary habits.

While challenges like unemployment and regional economic disparities persist, government policies promoting agricultural modernization and trade liberalization are supporting sector growth. Increasing consumer interest in sustainable products is reshaping market dynamics, further enhancing Shenyang's potential as a hub for imported food, both for local consumption and regional distribution.

Market for Imported Agricultural Products

Consumer buying patterns and strong domestic agricultural supply shape a competitive environment for imported ag products. Import activity is expanding, but imported agricultural products remain a small

Shenyang City at a Glance 2025 (1 USD = 7.2 RMB)	
Province	Liaoning
Population	9.07 million
Land Area	6,000 km ²
Gross Domestic Product (GDP)	\$1.26 trillion
GDP per capita	\$13,600
Per capita disposable income	\$8,100
Growth in per capita disposable income	3.9%, higher than national average
Total Retail Sales of Consumer Goods	\$62.8 billion (estimated)
<i>Source: Shenyang Economic Index Report 2025</i>	

share of overall imports. However, enhanced cold-chain and distribution infrastructure supports trade and availability of imported produce.

Food Retail

In 2025, Shenyang’s total retail sales of consumer goods remained flat, losing 2024’s momentum, mainly dragged down by a decline in fourth-quarter consumption of major commodities such as

Chart 1: SWOT Analysis of U.S. Food and Food Ingredients in Shenyang, China	
Strength	Weakness
<ul style="list-style-type: none"> • U.S. food products are viewed as high-quality and trustworthy by many Chinese consumers. • High-value processed products have differentiated appeal to rising middle-class consumption. 	<ul style="list-style-type: none"> • Tariff and trade volatility raise landed costs and pricing uncertainty for U.S. suppliers. • Limited distribution increases logistics costs.
Opportunity	Threat
<ul style="list-style-type: none"> • Target local processors, bakeries, and chains seeking reliable, specific-driven ingredients. • Shenyang’s logistics and cold storage capacity strengthen its role as a northeast import hub, improving cold-chain feasibility for perishables. • Launch small-pack, gift-ready, and health-focused products to boost retail adoption and seasonal sales. 	<ul style="list-style-type: none"> • Trade policy shifts or new tariffs could quickly erode price competitiveness. • Local and alternative import suppliers may undercut U.S. products in price-sensitive retail channels.

automobiles and petroleum. Essential grain and food consumption continued to grow, though at a slower pace than in 2024, while beverage consumption shifted from strong expansion to marked contraction. It reflects the same trend at the national level, driven by a combination of macroeconomic weakness, demographic aging, and structural shifts in consumption, where consumers prioritize essential food over discretionary beverage spending. By contrast, online retail of physical goods rose to roughly USD\$8.1 billion, with a growth rate of 6.7 percent, underscoring its role as a key stabilizer of the consumer market.

Shenyang's retail market features regional chains like BiYouTe and XinLongJia, alongside national players such as Sam's Club, Ole, Metro, and Yonghui that dominate imported food distribution. These high-end supermarkets attract urban residents and shoppers from nearby third-tier cities seeking bulk purchases of Western and specialty foods. Sam's Club and Ole stores in Shenyang consistently rank in the top ten in revenue generation country-wide, driven by strong purchasing power and limited regional alternatives. Wholesale markets like Tawan Meat, Yuhong Seafood, and BaJiaZi Fresh Fruit serve as retail hubs, especially during festivals.

Chart 2: Shenyang 2024&2025 Retail Market Summary (USD, billion)

Indicator	2024	2025	Year-on-Year Change
Total Retail sales of consumer goods	\$60.7	\$60.7	0 %
Grain & Food Retail Sales	\$5.4	\$5.8	8.9 %
Beverage Retail Sales	\$0.6	\$0.5	-13%
Online Retail Sales	\$7.6	\$8.1	6.7 %

The total number of convenience stores is relatively unchanged, though foreign brands like Lawson have grown rapidly with municipal government support targeting younger consumers. These stores focus on premium positioning and prime locations, offering strong channels for U.S. food products despite smaller market share versus local franchise networks.

Packaged foods—including snacks, candies, and alcohol— from Russia, Japan, and South Korea are highly visible due to Shenyang's Northeast Asia proximity. However, consumers eagerly adopt food trends from first-tier cities, though constrained by distance and resources. Local agricultural staples like beef, seafood, rice, and fresh fruits dominate the market.

Urban residents are price sensitive but have strong demand for a wide variety of high-quality food. U.S. food products should emphasize superior quality with competitive pricing. Products don't need cutting-edge innovation—Shenyang lags first-tier cities in variety, so modest differentiation can effectively capture this market.

Food Service

In 2025, Shenyang's food service industry grew robustly, with annual restaurant revenues exceeding USD 4.7 billion, a year-on-year increase of 6.3 percent. This growth rate far outpaced the zero growth in the city's total retail sales of consumer goods, making the catering sector a key bright spot in overall consumption. The market also expanded rapidly in scale: nearly 21,000 new catering enterprises were registered in the first half of 2025 alone, resulting in intensified competition and a distinct “dumbbell-shaped” structure—rapid growth of affordable, mass-market outlets on one end and high-end restaurants maintaining their business on the other, while mid-range restaurants struggle.

While Shenyang's food service sector follows national trends such as experience-driven consumption, digitalization, and the increasing use of prepared foods, it is distinguished by the strong role of commercial real estate and the high expectations of local consumers. Diners in Shenyang are discerning in taste and value, raising the bar for menu quality and price performance. At the same time, high-end and Western restaurants tend to concentrate on premium commercial properties to reach their target clientele, further reinforcing the link between location quality and market positioning in the city's food service industry.

While restaurants with lower average spending per customer tend to achieve higher overall sales, certain specialized categories—such as fast pizza, fries, barbecue, hot pot, and bakeries—stand out by maintaining high average spending alongside strong total sales. Specialty stores exhibit a trend of professionalism, vertical focus, and premium pricing. The more specialized a store is in a particular category, the higher its pricing potential. However, this approach carries investment risks, as success depends on the category's ability to stand out, gain popularity, and establish significant influence within its niche through clear differentiation and competitive advantages.

Amid this fierce competition, Shenyang still presents significant opportunities for U.S. food products and ingredients, including premium meats, seafood, dairy products, nuts, and special grains. For example, Shenyang's Xita district has become one of the city's key cultural and tourism "check-in" destinations. The area is renowned for Korean-style barbecue, where premium meat offerings rely heavily on U.S. beef. The city's openness to international cuisine—reflected in the popularity of Western fast food and bakeries—creates solid market potential for U.S. sauces, cheeses, and baking ingredients. However, U.S. food suppliers need to invest more time in tracking market dynamics and work more closely with regional distributors to understand local preferences and adapt to changing conditions.

Food Processing

Shenyang serves as a key food processing hub in Northeast China, with output rising to USD16.7 billion, 7.1 percent year-on-year increase over 2024, slightly above the national average. The industry spans the full value chain—from primary agricultural processing to deep processing, R&D product, and market distribution. The city hosts five provincial-level agricultural processing clusters, led by Shenbei, the largest deep-processing base in Northeast China. Core segments include traditional foods, alcoholic beverages, confectionery, processed meats, and regional specialties such as pickled vegetables and fresh corn. Strong cold-chain logistics, wholesale markets, and distribution infrastructure support both domestic and imported ingredients.

Compared with first-tier cities like Beijing, Shanghai, and Guangzhou, Shenyang focuses more on agricultural processing, cold storage, and regional distribution across Liaoning, Jilin, and Heilongjiang. Its lower labor and land costs, combined with expanding logistics capacity, make it attractive for volume processing, though it still trails in premium R&D and last-mile delivery efficiency.

Shenyang offers growing opportunities for U.S. whey, dairy proteins, specialty proteins, premixes, and functional ingredients which are valued by local processors for formulation stability and performance. Establishing local warehousing and localized SKUs for online and seasonal markets can help U.S. exporters strengthen their foothold in the Northeast China food industry.

Market Entry

Despite its population of over 9 million, Shenyang is a developing second-tier city with limited penetration of imported products, offering significant opportunities for U.S. exporters. Local feedback indicates that U.S. food and agricultural products lack sufficient promotion compared to competitors. Enhanced marketing efforts—such as targeted campaigns and strategic partnerships—could boost U.S. market share and visibility.

Although Shenyang is not a major trade hub for imports in China, regional tradeshows such as Huajiao Food Service Exhibition, provide a key entry point for U.S. businesses. Strengthening partnerships with the exhibition organizers and regional distributors can further facilitate U.S. product access.

Best Product Prospects

- Bakery Ingredients

China’s bakery industry has grown rapidly, which is illustrated in [the Food Processing Ingredients Annual Report](#). Unlike regions dominated by Western-style bakeries, Shenyang features a strong mix of traditional Chinese and creative Western-style bakeries, emphasizing quality, fresh ingredients, and experiential consumption. Many local brands have gained national recognition, expanding into cities like Beijing, Xi’an, Qingdao, and Tianjin. American bakery ingredients, including wheat flour, dairy products, nuts, dried fruits, chocolate, and cocoa, have strong market potential in Shenyang and across China.

- Livestock Products

As operators face economic pressures and rising costs, demand is growing for high-quality, sustainably sourced protein to support product differentiation and protect margins. This environment creates strong opportunities for U.S. exporters of beef, pork, and poultry. Shenyang also illustrates how China’s lower-tier cities—benefiting from rising household incomes, lower living costs, and more relaxed lifestyles—are driving consumption upgrades and creating new market openings for U.S. food suppliers.

Chart 3: China BBQ Restaurants vs. Shenyang BBQ restaurants (2025)

Indicator	China	Shenyang
Total Number of Restaurants	7,700,000	93,700
Number of BBQ Restaurants	545,000	10,500
Share of BBQ Restaurants	7 %	11.2 %
Number Year-on-Year Growth (2024–2025)	6.4%	19 %
Market Size	\$113.9 billion	\$2.3 billion
Sales growth Rate	12.5 %	22%
Average Order Value	\$9.7	\$12.5

- Brewing ingredients

Shenyang, awarded the title of “China’s Beer Capital” in 2024, has rapidly developed its beer industry with a strong emphasis on both large-scale and craft brewing. Shenyang’s beer industry benefits from a robust supply chain, including stable upstream raw material provision, a well-developed packaging sector, and a distribution network that serves over 50,000 retail endpoints.

However, like the rest of China, Shenyang’s craft beer market is still in an early stage compared to mature markets like the US, where craft beer accounts for nearly 25 percent of total beer sales. This gap presents significant market potential for U.S. craft beer ingredients—such as specialty malts and hops—(see [2025 U.S. Brewing Ingredients Reports](#)) as Chinese brewers seek to differentiate their products and meet rising consumer demand for quality and variety. The report [Navigating Opportunities and Challenges in China Imported Craft Beer Market](#) provides a closer look for those wishing to tap into second-tier cities like Shenyang.

Key Agriculture-related Trade Shows and Events in Shenyang

- Shenyang Catering Supply Chain Expo (April)

This UFI-certified expo, with over a decade of successful editions, is Northeast China's premier foodservice trade show specializing in frozen products, premium fresh meats, Chinese and Western cuisine ingredients, ready-to-cook dishes, and beverages. The exhibition provides U.S. suppliers with direct access to high-volume buyers including chain restaurant groups, Western dining establishments, BBQ and hotpot chains, hotel procurement teams, central kitchen operators, foodservice distributors, and institutional catering enterprises throughout Northeast China's three provinces. With its laser focus on restaurant supply chain procurement and proven track record of connecting international suppliers with regional foodservice buyers, this expo offers American exporters a strategic entry point into one of China's most dynamic foodservice markets.

- Northeast Asia International Consumer Goods Expo (June)

This major provincial-level comprehensive consumer exhibition operates on a dual B2B+B2C platform, featuring dedicated pavilions for cross-border e-commerce imported foods and a specialized Northeast Asia zone showcasing Japanese, Korean, and Russian imported goods. The expo provides U.S. suppliers with direct access to high-value buyers including cross-border e-commerce platforms, chain supermarkets, premium lifestyle retailers, corporate gift procurement teams, live-streaming e-commerce merchants, and community retail networks. With its strategic focus on imported products and diverse buyer channels, this exhibition offers American exporters an efficient gateway to penetrate Northeast China's rapidly growing consumer market.

- Zhenshimei Supply Chain Exclusive Supermarket Annual Procurement & Ordering Festival (Spring)

This exclusive supply chain procurement event, held annually since 2024, is Northern China's most precisely targeted internal bulk procurement platform for fast-moving consumer goods, agricultural products, and imported foods. The event brings together national leading chain supermarket executives, procurement directors, food manufacturers, and imported food brand owners for one-on-one negotiations. It exclusively serves B2B clients including county-level private chain supermarkets, regional retailers, and Northeast China's supermarket group purchasing channels—all decision-makers with annual purchasing budgets (closed to public). The platform provides the most efficient channel for U.S. suppliers to rapidly enter Northern China's lower-tier supermarket networks through comprehensive category matchmaking in foods, beverages, fresh products, and cross-border imported goods.

Key Contacts and Further Information

- For a general guide on exporting to China, please refer to the 2025 FAS GAIN report [Exporter Guide Annual | CH2025-0133](#).
- For an overview of China's food processing and food manufacturing industry update, please refer to 2026 FAS GAIN report Food Processing Ingredients Annual | CH2025-0052.

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