

# INDUSTRY NEWS

China Livestock | Animal Health | Animal Nutrition

## China's Feed Industry 2025: Double Growth, Scale Expansion & Innovation-Driven Progress

National total industrial feed output hit 342.25 MMT(+8.6% YoY), including 319.46 MMT of compound feed, 13.38 MMT of concentrated feed, and 7.53 MMT of premixed feed additives; by product category, swine feed (166.394 MMT, +15.6%), pet feed (1.88 MMT, +17.9%) and meat poultry feed (100.98 MMT, +3.5%) saw solid growth, while other feeds decreased by 12.5% to 2.19 MMT.

Large scale feed manufacturers with **more than 100,000 tonnes** per year were **1,127**. This segment of the market produced 223.15 MMT feed, accounting for 65.2% of national output.

Enterprise with annual output over 1 million tonnes numbered 37, This segment of the market produced 57% of total production, indicating how China's feed industry has been consolidated and the power of the these 37 enterprises (Source: China Feed Industry Association, 2<sup>nd</sup> February 2026)

## 2025 China Livestock Production Hits New Milestone: Meat Output Surpasses 100 Million Tonnes



The National Bureau of Statistics (NBS) released data on January 19 showing that 2025 witnessed a robust performance in the country's animal husbandry industry, with multiple key indicators reaching encouraging levels . This not only underscores the stability of China's food supply chain but also signals positive trends for the global agricultural market.

Total meat output breaks through 100 million tonnes: the combined output of pork, beef, mutton, and poultry meat reached 10.072 million tonnes, a year-on-year increase of 4.2% (up 4.09 million tonnes from the previous year). This marks the first time the figure has exceeded the 100 million-tonne threshold, a significant milestone for China's livestock production .

**Pork Production Hits Record High:** As the dominant category in China's meat consumption, pork output rose by 4.1% year-on-year to 5.94 million tonnes (an increase of 2.32 million tonnes). This record-high production reflects





## China's Meat & Offal Imports Drop 8.7% YoY, Dairy Imports Rise 1.6% in 2025

According to the latest customs import statistics, in terms of meat and offal imports, the total import volume in the whole year reached 6.09 million tonnes, a year-on-year decrease of 8.7%.

Pork imports stood at 980,000 tonnes, a year-on-year decrease of 9.0%. Poultry meat imports fell the most significantly, with a total of 266,000 tonnes imported, a sharp year-on-year drop of 34.4%. Beef, as the largest category in meat imports, reached 2.8 million tonnes, a relatively mild year-on-year decrease of 2.5%, showing strong market demand resilience. Mutton imports totaled 339,000 tonnes, a year-on-year decrease of 7.5%.

The total import volume of dairy products reached 2.66 million tonnes, a year-on-year increase of 1.6%. Among them, milk powder had an import volume of 850,000 tonnes, a year-on-year increase of 0.8%. (Source: China Custom, 28<sup>th</sup> January, 2026)

the sector's ability to meet market demand stably.

Steady growth in pig slaughter and inventory: a total of 719.73 million pigs were slaughtered in 2025, up 2.4% year-on-year (an increase of 17.16 million heads). By the end of the year, pig inventory stood at 429.67 million head, a slight growth of 0.5% .

Balanced breeding sow inventory: the inventory of reproductive sows was 39.61 million head, a 2.9% decrease year-on-year, but still 1.6% above the normal stock level. This indicates a rational adjustment of production capacity, laying a solid foundation for stable supply in 2026.

The strong performance of the livestock sector in 2025 is attributed to the synergistic effect of market regulation and policy guidance. Authorities have effectively guided capacity adjustment through early warnings and window guidance, helping the industry navigate price fluctuations and maintain profitability. (Source: National Statistics Bureau, 19<sup>th</sup> January 2025)

## 2025 China Pig Industry: Scaling Accelerates as Leading Players Hit New Slaughter Volume Highs



In 2025, China's pig industry saw structural growth in slaughter volumes among top players, driven by three key forces: accelerated scaling, enhanced biosecurity, and policy standardization. The latest industry slaughter data vividly reflects this transformation.



Looking at 2025 pig slaughter volumes and year-on-year growth, the industry landscape continues to consolidate toward large-scale operators.

Muyuan Foods retained its top position with 77.98 million head slaughtered (up 8.91% YoY), solidifying its scale barrier via an integrated full-industry-chain model.

Wens Foodstuffs recorded 40.48 million head (a striking 34.11% YoY surge), the refined management of its "company + farmer" model drove this strong expansion.

Zhengbang Technology delivered an extraordinary 105.88% YoY growth (8.54 million head), capitalizing on post-consolidation market space and upgraded farming facilities.

Mid-tier players like Xingjiang Muge (589,100 head, 76.80% YoY) and Giant Star Agriculture & Husbandry (4.58 million head, 66.26% YoY) also thrived, showing broad momentum across the sector.

### **Behind the Growth: Three Core Drivers of 2025's Hog Industry**

#### 1. Policy-led scaling push

Regulations on standardized farming (e.g., phasing out unregulated backyard operations) lifted the industry's large-scale farming rate to over 70% in 2025, clearing space for top players to expand.

#### 2. Biosecurity upgrades reduce volatility

Wider adoption of precision farming (automated feeding, air filtration systems) and genetic improvement, stabilizing production capacity for scaled enterprises.

#### 3. Integrated chains boost efficiency

Leaders like Muyuan and Wens expanded into processing and distribution, linking slaughter volumes to end-market demand and reducing profit fluctuations from raw hog price swings.

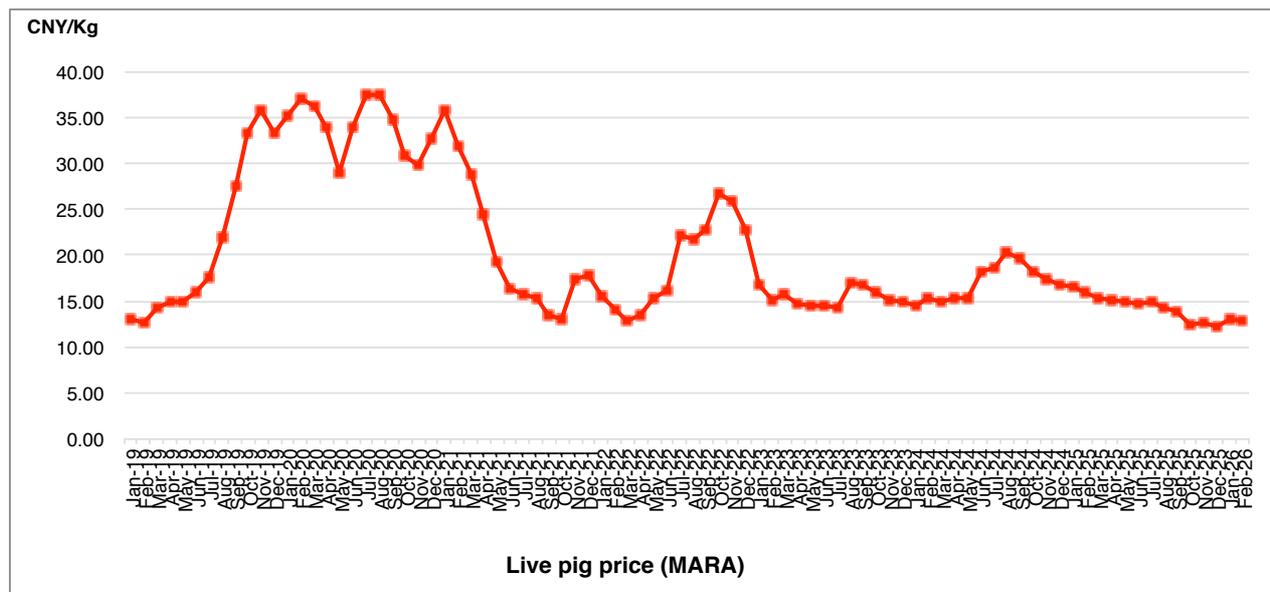
#### What This Means for the Industry

2025 marks a turning point: China's pig sector is shifting from "volume-first" to "quality + scale-driven growth." For players, scaling with technology, compliance, and vertical integration will be the key to long-term competitiveness. (Source: Henan Journal of Animal Husbandry and Veterinary Medicine, 27<sup>th</sup> January 2025)

### **Live pig price in February 2026**

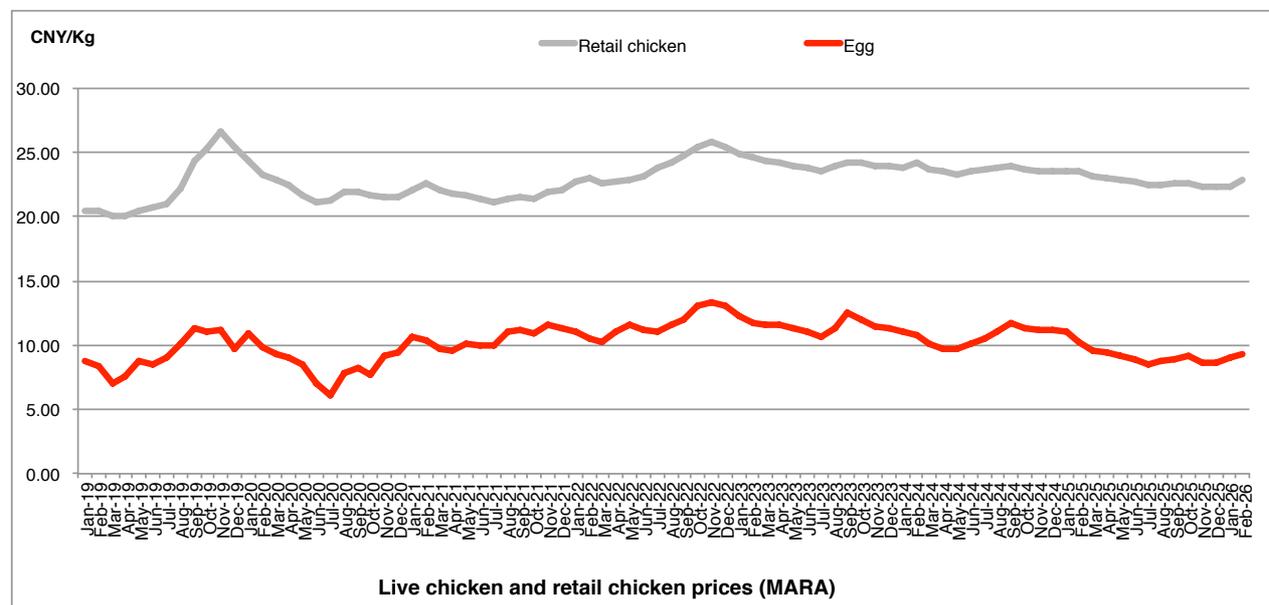
China pig average pig prices in China was CNY 12.94/kg in February, which was 0.3% lower than the previous month and 19.1% lower than the same period last year.(Source: MARA, February 2026)





### Chicken and egg price in February 2026

China chicken and egg average chicken prices in China was CNY 22.82/kg and CNY 9.24/kg in February chicken price was 2.0% higher than the previous month and 2.8% lower than the same



period of last year. Egg price was 2.5% higher than the previous month and 9.4% lower than the same period last year. (Source: MARA, February 2026)

