中国肉类协会
China Meat Association

Meat Industry Outlook
肉 类 产 业 展 望

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1 中国肉类产业发展现状
SITUATIONS

2 肉类产业发展面临的挑战
CHALLENGES

3 如何应对挑战
TO DEAL WITH

猪肉生产快速恢复；肉类总产量创历史新高

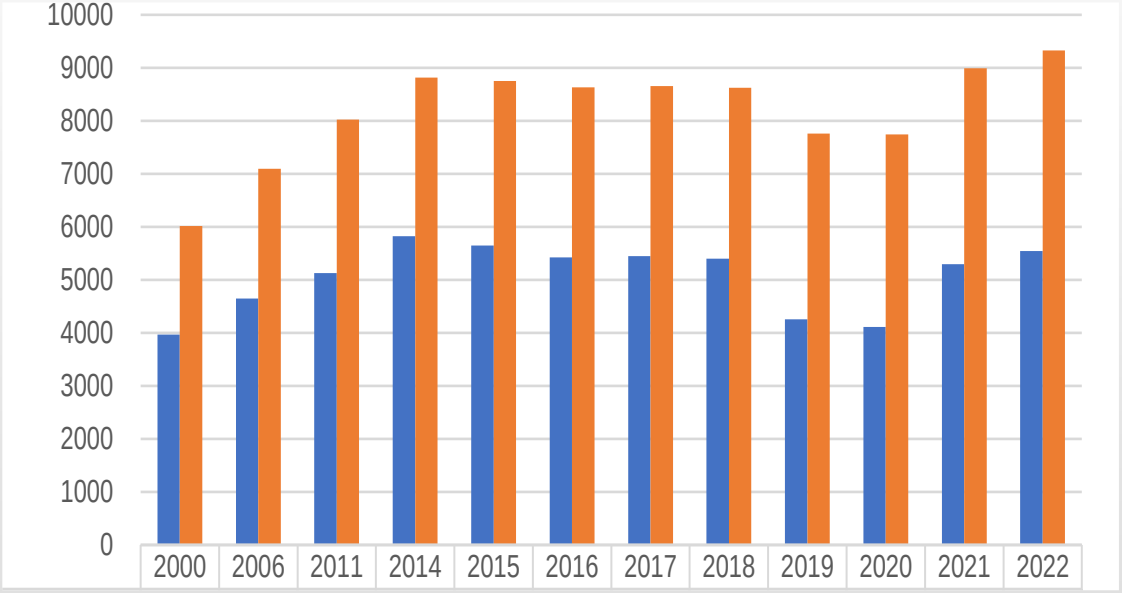
Pork production recovered rapidly and the total meat production is at a record high

- 中国生猪生产较快恢复。2022年猪肉产量超过5,500万吨，较2020年增加34%，接近疫情前最高产量
- Pork production in 2010 exceeded 55 million tons, an increase of 34% over 2020 and close to the highest production before the pandemic.

- 中国肉类总产量超过猪瘟疫情前。2022年肉类产量首次超过9,000万吨，达到9,328万吨
- The total meat production in China is higher than it was before the outbreak of ASF. In 2022, meat production exceeded 90 million tons for the first time, reached 93.28 million tons.

- 2023年上半年中国肉类生产稳定发展，猪牛羊禽肉合计产量4682万吨，同比增加164万吨，增长3.6%
- In the first half of 2023, China's meat production developed steadily, with a total production of 46.82 million tons of pork, beef, sheepmeat and poultry meat, an increase of 1.64 million tons, increased by 3.6% on year-on year basis.

猪肉、肉类年产量（万吨）
Annual Output of Pork & Meat (10,000 tons)



中国肉类产量居于全球首位
China leads the world in meat production

- 1991年中国肉类产量首次突破3000万吨，跃居全球首位。此后30多年中国肉类产量稳居全球首位
- In 1991, China's meat production exceeded 30 million tons for the first time, ranked the first in the world. In the following 30 years, China's meat production kept the first position in the world.

- 2022年全球肉类产量在3.6亿吨左右，中国肉类产量占全球产量的1/4
- In 2022, the world meat production was about 360 million tons, and China's meat production accounted for a quarter of the world production.

- 中国猪肉、羊肉产量多年来稳居全球首位；猪肉产量占全球猪肉产量的近40%，羊肉产量占全球羊肉产量的近1/3
- The pork and sheepmeat production in China has ranked first in the world for many years. Pork production accounts for nearly 40% of global pork production, and sheepmeat production accounts for nearly one-third of global sheepmeat production.

- 2022年中国禽肉产量超过2400万吨，居全球首位
- In 2022, China's poultry meat production exceeded 24 million tons, ranked the first in the world.

- 2022年中国牛肉产量超过700万吨，仅低于美国、巴西，位居全球第三
- In 2022, China's beef production exceeded 7 million tons, ranked the third in the world and only behind the United States and Brazil.

年消费过亿吨，人年均肉类消费量超过70千克

Annual consumption exceded 100 million tons with the annual meat consumption per capita of over 70 kilograms

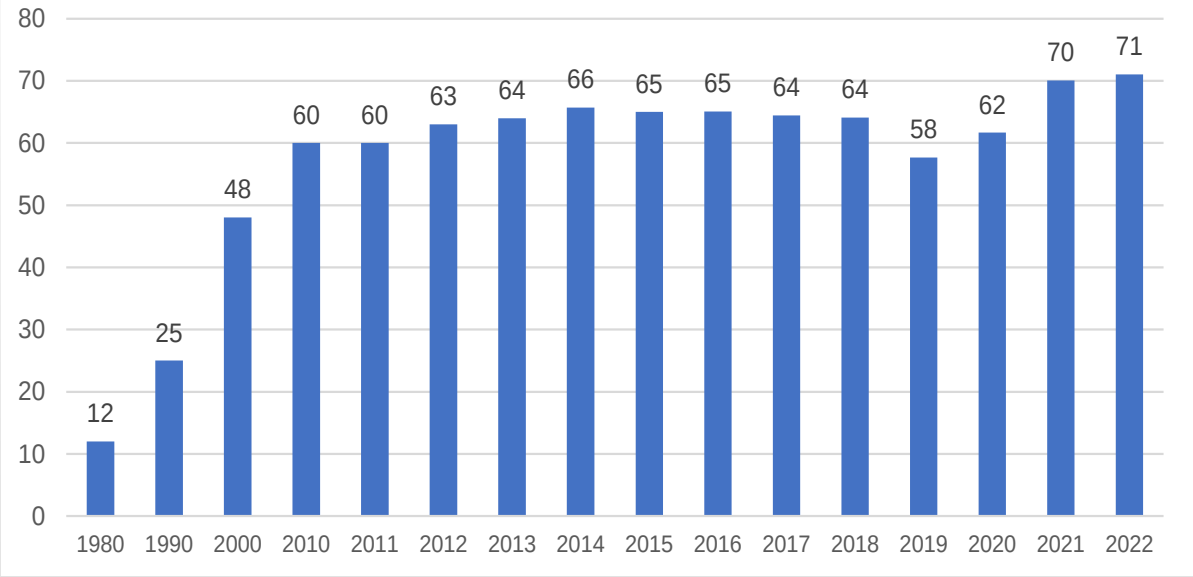
- 2022年，中国肉类消费总量超过1亿吨，人年均消费量达到71千克
- In 2022, the total meat consumption in China exceded 100 million tons, and the annual meat consumption per capita reached 71 kilograms.

- 中国居民人均肉类消费量总体呈先快速上升后趋稳的态势
- The meat consumption per capita of Chinese residents showed a rapid rise at first and then a steady trend

- 中国肉类消费量预计还有增长空间，但增速将放缓
- The meat consumption in China is expected to grow, but at a slower pace

- 未来肉类消费的变化更多体现在消费品质提升、消费结构转换上
- The future changes in meat consumption are more reflected in the improvement of consumption quality and the transformation of consumption structure

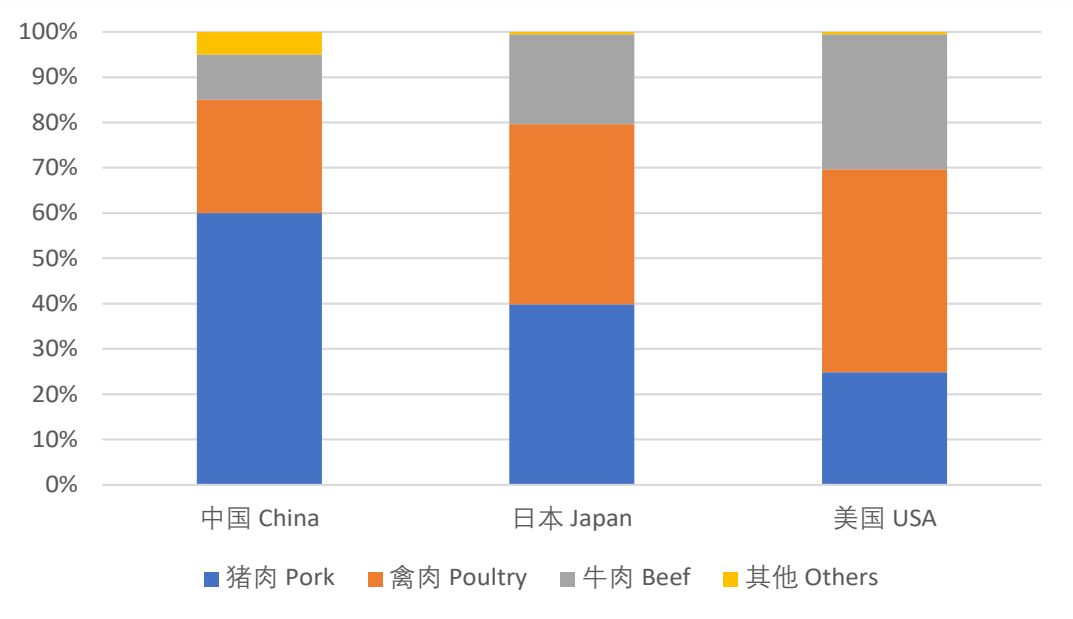
中国人年均肉类消费量（千克）
Annual Meat Consumption Per Capita (kg)



猪肉占比偏高；牛羊禽肉占比预计将提高

The proportion of pork is high, while the proportion of beef, sheepmeat and poultry meat is expected to increase

肉类消费结构
Meat Consumption Structure



	猪肉 Pork	牛肉 Beef	羊肉 Sheepmeat	禽类 Poultry
In the next 10 to 15 Years	50-55%	10%	5%	30-35%

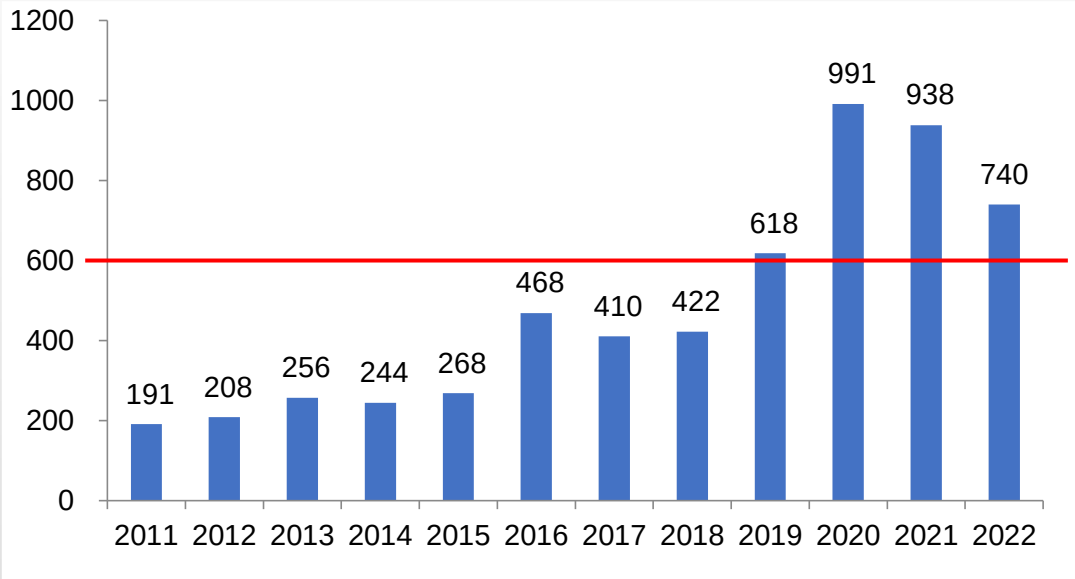
中国肉类进口量巨大，是全球最大的肉类进口国

China imports a huge amount of meat and is the world's largest meat importer

- 2019年以来，历年进口量超过600万吨
- Since 2019, the annual import volume of China has exceeded 6 million tons

- 根据2020年国务院办公厅《关于促进畜牧业高质量发展的意见》，猪肉自给率保持在95%左右，牛羊肉自给率保持在85%左右，禽肉和禽蛋实现基本自给
- According to the ***Opinions on Promoting High-quality Development of Animal Husbandry*** issued by the General Office of the State Council in 2020, the self-sufficiency rate of pork was maintained at about 95%, and the beef and sheepmeat was at about 85%. The poultry meat and poultry eggs were basically self-sufficient.

肉类进口量（万吨）
Meat Imports (10,000 tons)



中国对畜禽副产品的进口需求大
China has a large import demand for livestock and poultry by-products

- 进口肉类中有1/4以上为畜禽副产品：2022年中国共进口肉类740万吨，其中畜禽副产品接近200万吨（193万吨），占比达26.1%
- More than a quarter of imported meat is livestock by-products: In 2022, China imported 7.4 million tons of meat, of which livestock by-products were close to 2 million tons (1.93 million tons), accounting for 26.1%.

2022年畜禽副产品进口情况
By-products Imports in 2022

	Import Quantity	Proportion
总进口量 Total	740	100.0%
牛肉 Beef	269	36.4%
畜禽副产品 By-products	193	26.1%
猪肉 Pork	176	23.8%
羊肉 Sheepmeat	36	4.8%
禽肉 Poultry	56	7.6%
其他 Others	10	1.4%

食用畜禽副产品加工卫生规范即将出台，预计有利于扩大畜禽副产品进口

The hygienic standards for processing edible livestock and poultry by-products will be released soon, which is expected to help expand the import of livestock and poultry by-products



中华人民共和国国家标准

GB xxxx—xxxx

食品安全国家标准

食用畜禽副产品加工卫生规范

（送审稿）



食品安全国家标准

食用畜禽副产品加工卫生规范

1 范围

本标准规定了食用畜禽副产品加工过程中的原料收集、分类、修整、清洗、冷却、冷冻、检验、包装、贮存与运输、产品追溯与召回等环节的场所、设施设备、人员的基本要求和卫生控制的管理准则。

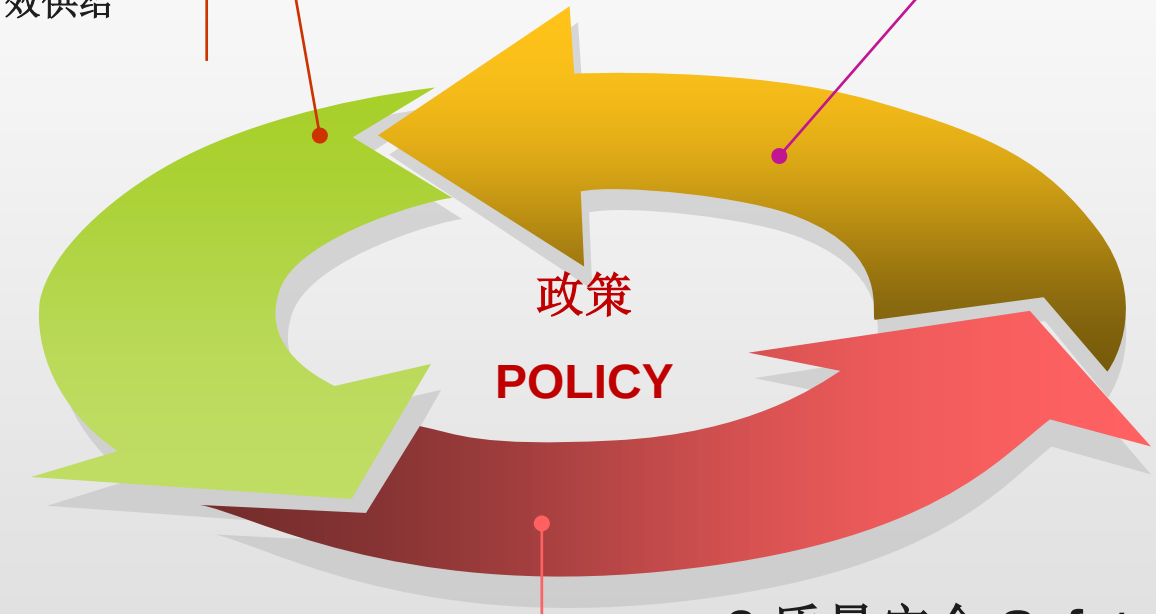
本标准适用于食用畜禽副产品的加工。

中国政府高度重视肉类产业，确保肉类供给安全，并实现高质量发展

The Chinese government attaches great importance to the meat industry to ensure the safety of meat supply and achieve high-quality development

1 数量安全 Security

- 历年中央一号文件强调，确保国家粮食安全和重要农副产品有效供给



3 高质量发展 High-quality Development

- 畜禽养殖规模化率提高
- 畜禽粪污综合利用率提高
- 动物疫病防控能力增强
- 绿色发展水平提高
- 肉类自给率较高
- 整体竞争力提高

2 质量安全 Safety

- 《中华人民共和国食品安全法》
- 《中华人民共和国农产品质量安全法》
- 《中华人民共和国畜牧法》

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2	肉类产业发展面临的挑战 CHALLENGES
3	如何应对挑战 TO DEAL WITH

主要挑战 CHALLENGES

01 动物疫病 Animal Diseases

02 气候变化与极端天气 Climate Change and Extreme Weather

03 Geopolitics 地缘政治

04 劳动力短缺与成本上升 Labor Shortages and Rising Costs

主要挑战 CHALLENGES

05 环境保护
Environmental Protection

06 素食主义
vegetarianism

07 Criticical Public Opinion 不良舆论

08 Cultivated Meat 人造肉

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中国肉类协会
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- 设立全球肉类消费日
  Set up a World Meat Day
- 建立舆情应对工作机制
  Establish a working mechanism to respond to public opinion
- 建立信息互通工作机制
  Establish a working mechanism for information sharing
- 鼓励科技进步
  Encourage scientific and technological progress

中国肉类协会
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- 中国肉类协会成立于1992年，协会下设13个分会，6个工作委员会，会员单位近6,500家
- Founded in 1992, China Meat Association has 13 branches, 6 working committees and nearly 6,500 member companies.

DEPARTMENTS & BRANCHES



13 Species Branches

- Pork Branch — President: ZHENG Simin
- Beef & Lamb Branch — President: CHEN Xibin
- Poultry & Eggs Branch — President: LIU Jiqing
- Natural Casing Branch — President: HE Dekang
- Importers & Exporters Branch — President: MA Jie
- Machinery & Equipment Branch — President: SHI Ming
- Packaging Branch — President: SONG Jianxin
- Meat Ingredients Branch — President: LI Hongjiu
- Cold-Chain Logistics Branch — President: LIU Shengru
- Meat Snacks Branch — President: CHU Jieming
- Fermented Ham Branch — President: HOU Wuqun
- Beef/Lamb Importers Club Branch — President: MA Guangsheng
- Wholesalers and Retailers Branch — President: YANG Xinzan

6 Working Committees

Complaint Mediation Working Committee



Food Safety and Industry Healthy Development Working Committee



Industry Credit System Construction Working Committee



Standardization Working Committee



Science and Technology Working Committee



Veterinary Sanitary Inspection Working Committee



合作全球肉类行业　搭建世界交流平台

Building the International Exchange Platform to Promote the Cooperation with Global Meat Industry



我们已与四十多个国家的驻华使领馆、三十多个国家和地区的肉类行业组织和相关机构、近千家国际肉类企业建立了友好合作关系。定期与上述机构开展互访活动和信息交流，在不断加强国际肉类行业及企业间的合作交流与推进经济贸易等方面发挥着重要的桥梁与纽带作用，为促进全球肉类工业持续发展做出了积极的贡献。

China Meat Association builds the cooperation relationships with more than 40 embassies and consulates in China, over 30 meat organizations and almost 1,000 meat companies worldwide, and organizes visits and information exchanges with them regularly. China Meat Association plays an important role in promoting the communication, cooperation, economic and trade development, contributing to the sustainable development of the global meat industry.

中国肉类协会
China Meat Association

THANK YOU



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