

China Agriculture

China State Council reiterated roadmap for a strong agriculture sector

On Apr 7th, the State Council published a national plan for Accelerating the build of a strong agricultural sector 2024-2035 (加快建设农业强国规划 (2024—2035年) ([link](#))). The plan reiterated the policy goals of a strong China agriculture sector, including grain supply security, quality improvement in land, soybean meal substitution, seeds and breeding, Ag tech machinery, and food waste management. While most of the discussions are consistent with the past and recent policy announcements, the intensity of the related policy issuance YTD and more quantified targets including clear timeline, suggest a more advanced roadmap for the sector's development, in serving China's food security as a goal, in particular in a more uncertain geopolitical environment ([link](#)), in our view.

Key highlights of the announcement:

- Securing domestic grain supply: The plan set 2027E target on domestic grain production capacity to stay above 700mnt, with reasonable self-sufficiency level on key agricultural products (consistent with country's 14th 5-year plan ([link](#))). Key supporting measures included 1) maintain national grain planting area above 1.75bn mu (vs. 1.79bn mu in 24A) during the period, and 2) unit production output increases ([link](#)).
- Quality improvement on arable land: The plan focuses on construction of high-quality farmland in regions with sustainable irrigation condition (i.e. Northeast regions), comprehensive use of saline-alkali land, and arable land restoration. Key targets including securing national arable land size above 1.87bn mu, and a full conversion of permanent basic farmland (永久基本农田) into high-quality farmland (implying an 80% penetration of high-quality farmland nationwide by 2035E, from 54% in 2023A).
- Soybean meal substitution: The plan promotes the adoption of low-protein feed, using alternative meal types and grains for substitution of soybean meal.
- Seed/breeding enhancement: The government would accelerate the commercialization of biotech seeds during 2025-2035E, combined with introduction of new high-oleic, high-yield soybean varieties, saline-alkali tolerant varieties, and new germplasm resources. Other supporting measures include

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stringent IP protection, and construction of modern seed production base. For livestock (incl. poultry), the plan focus would be breeding technology improvement, and establishment of national joint research platform.

- Development of advanced Ag machinery: The plan reiterates the importance on developing high-end intelligent equipment (including key components), small-sized agricultural machines applied for Southern regions, and integrated manufacturing supply chain. There is also reiteration on expanding scope and subsidy level for trading in obsolete agricultural machinery products, consistent with No.1 Central document for 2025E ([link](#)).
- Food waste management: Target on food waste management was consistent with past years, with focus on grain saving during planting, harvesting, storage and processing, through increasing use of loss-saving harvesting machines, and improving processing and storage technology.

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