Food and Agriculture Organization of the United Nations

GIEWS Country Brief
The People's Republic of China (mainland)

Reference Date: 21-July-2025

FOOD SECURITY SNAPSHOT
- **Record wheat crop production forecast in 2025**
- **Cereal imports forecast significantly below-average in 2024/25**
- **Domestic prices of wheat grain and rice lower year-on-year in June 2025**

Record wheat crop production forecast in 2025

Harvesting of the 2025 main *winter* wheat crop, accounting for about 90 percent of the annual output, concluded in early July. The area planted is estimated slightly above the five-year average, mostly supported by government incentives, including a minimum support price and the provision of subsidized agricultural inputs. Moreover, generally favourable weather conditions in key producing areas, coupled with adequate supply of irrigation water and widespread use of high-yielding seed varieties, benefitted yields. The 2025 minor *spring* wheat crop, accounting for about 10 percent of the annual output, is currently in the tillering to jointing stages of development and harvesting is expected to start by mid-July. Field assessments from mid-June 2025 indicated favourable growing conditions for the *spring* wheat crop in most parts of the country. Overall, the 2025 aggregate wheat output (winter and spring crops) is forecast at a record 141 million tonnes.

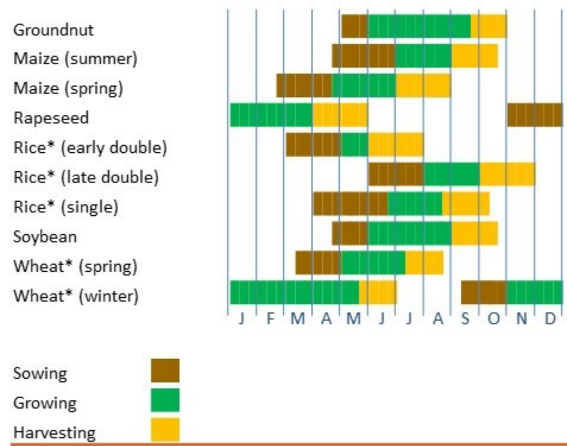
Harvesting of the 2025 *early double* rice crop just started and it is expected to conclude at the end of July, while the *single* and *late double* rice crops, for harvest between August and November, are currently being planted. Overall, the aggregate area sown with rice in 2025 is forecast at a level close to the five-year average. Harvesting of the 2025 *spring* maize crop is expected to start in July, while the *summer* maize crop, for harvest from September onwards, is currently being planted. The aggregate area sown with maize in 2025 is forecast above the average, driven by the strong domestic demand for feed commodities.

Cereal imports forecast significantly below-average in 2024/25

Total cereal import requirements in the 2024/25 marketing year are forecast at a significantly below average 27.8 million tonnes, reflecting ample carryover stocks from large imports in 2023/24 and the record domestic cereal production harvested in 2024. Imports of sorghum are forecast at 5.5 million tonnes in the 2024/25 marketing year (October/September), about 25 percent

China

Crop Calendar (*major foodcrop)



China

Cereal Production

	2019-2023 average	2023	2024 estimate	change 2024/2023
	000 tonnes			percent
Maize	272 009	288 842	294 917	2.1
Rice (paddy)	209 882	206 603	207 535	0.5
Wheat	135 821	136 590	140 099	2.6
Others	9 892	9 990	9 605	-3.9
Total	627 602	642 025	652 156	1.6

Note: Percentage change calculated from unrounded data.

below the average. Imports of wheat are estimated at 4.7 million tonnes in the 2024/25 marketing year (July/June), representing about half the average level. Imports of maize are forecast at 4 million tonnes in the 2024/25 marketing year (October/September), about one quarter of the average level. By contrast, imports of barley in 2024/25 marketing year (July/June) are estimated at above average 11.5 million tonnes, likely encouraged by low international prices.

Domestic prices of wheat grain and rice lower year on year in June 2025

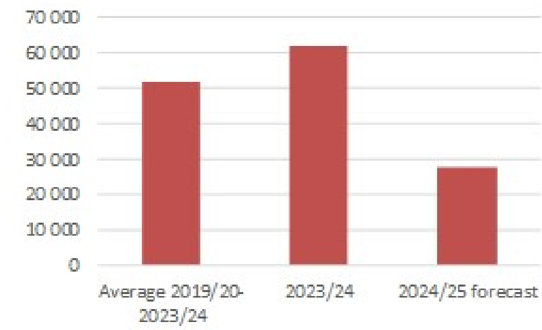
Wholesale prices of wheat grain declined steadily from November 2023 to January 2025, due to ample market availability from the above-average harvests attained in 2023 and 2024, and the large volume of imports in the 2023/24 marketing year. Since February 2025, prices have mildly increased in line with seasonal trends and, as of June 2025, they were about 5 percent lower year-on-year.

Wholesale prices of *Indica* rice, have been declining since mid-2024 and, as of June 2025, they were slightly below their year earlier level, reflecting adequate market availability.

China

Cereals Imports

000 tonnes

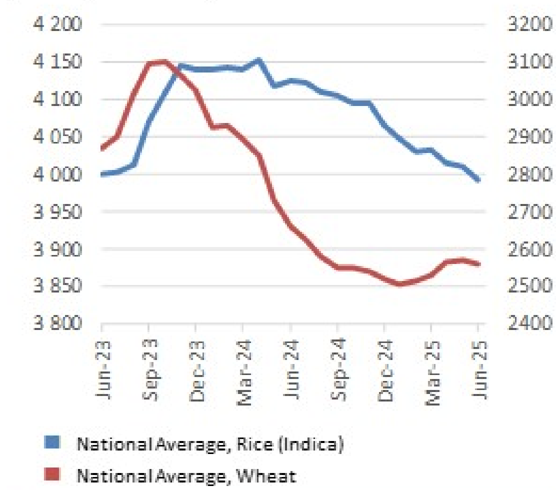


Notes: Includes rice in milled terms. Split years refer to individual crop marketing years (for rice, calendar year of second year shown).

China

wholesale prices of wheat and rice

yuan or yuan renminbi per tonne



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Integrated Food Security Phase Classification (IPC) https://www.ipcinfo.org/.

GIEWS Country Brief

The People's Republic of China (mainland)

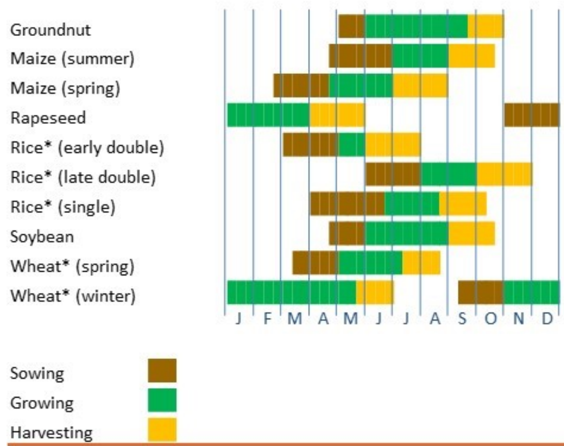
Reference Date: 15-July-2025

FOOD SECURITY SNAPSHOT

- **Record wheat crop production forecast in 2025**
- **Cereal imports forecast significantly below-average in 2024/25**
- **Domestic prices of wheat grain and rice lower year-on-year-in June 2025**

China

Crop Calendar *(*major foodcrop)*



China

Cereal Production

	2019-2023 average	2023	2024 estimate	change 2024/2023
	000 tonnes			percent
Maize	272 009	288 842	294 917	2.1
Rice (paddy)	209 882	206 603	207 535	0.5
Wheat	135 821	136 590	140 099	2.6
Others	9 892	9 990	9 605	-3.9
Total	627 602	642 025	652 156	1.6

Note: Percentage change calculated from unrounded data.

Record wheat crop production forecast in 2025

Harvesting of the 2025 main *winter* wheat crop, accounting for about 90 percent of the annual output, is underway and it is expected to finalize in early July. The area planted is estimated slightly above the five-year average, mostly supported by government incentives, including minimum support price and the provision of subsidized agricultural inputs. Moreover, generally favourable weather conditions in key producing areas, coupled with adequate supply of irrigation water and widespread use of high-yielding seed varieties, benefitted yields. The 2025 minor *spring* wheat crop, accounting for about 10 percent of the annual output, is currently at tillering to jointing stages of development and harvesting is expected to start by mid-July. Field assessments from mid-June 2025 indicate favourable growing conditions for the *spring* wheat crop in most parts of the country. Overall, the 2025 aggregate wheat output is forecast at record 141 million tonnes.

Harvesting of the 2025 *early double* rice crop just started and it is expected to conclude at the end of July, while the *single* and *late double* rice crops, for harvest between August and November, are currently being planted. Overall, the aggregate area sown with rice in 2025 is forecast close to the average. Harvesting of the 2025 *spring* maize crop is expected to start in July, while the *summer* maize crop, for harvest from September onwards, is currently being planted. The aggregate area sown with maize in 2025 is forecast above the average, underpinned by the strong demand of the local feed industry.

Cereal imports forecast significantly below-average in 2024/25

Total cereal import requirements in the 2024/25 marketing year are forecast at significantly below average 27.8 million tonnes, reflecting ample carryover stocks from large imports in 2023/24 and the record domestic cereal production harvested in 2024. Imports of sorghum are forecast at 5.5 million tonnes in the 2024/25 marketing year (October/September), about 25 percent below the average. Imports of wheat are estimated at 4.7 million tonnes in the 2024/25 marketing year (July/June), representing about half the average level. Imports of maize are forecast at 4 million tonnes in the 2024/25 marketing year (October/September), about one quarter of the average level. By contrast, imports of barley in 2024/25 marketing year (July/June) are estimated at above average 11.5 million tonnes, likely encouraged by low international prices.

Domestic prices of wheat grain and rice lower year-on-year in June 2025

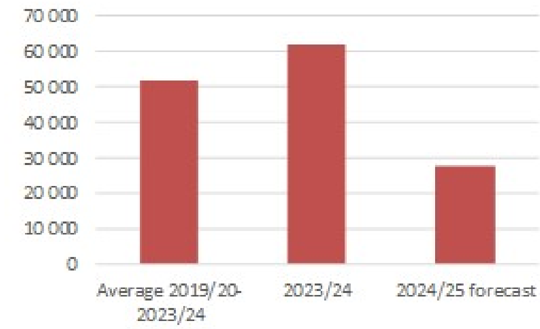
Wholesale prices of wheat grain steadily declined from November 2023 to January 2025, due to ample market availability from the above average harvest attained in 2023 and 2024 and the large volume of imports in 2023/24 marketing year. Since February 2025, prices have mildly increased in line with seasonal trends and, as of June 2025, they were about 5 percent lower year-on-year.

Wholesale prices of *Indica* rice, have been declining since mid-2024 and, as of June 2025, they were slightly below their year earlier level, reflecting adequate market availability.

China

Cereals Imports

000 tonnes

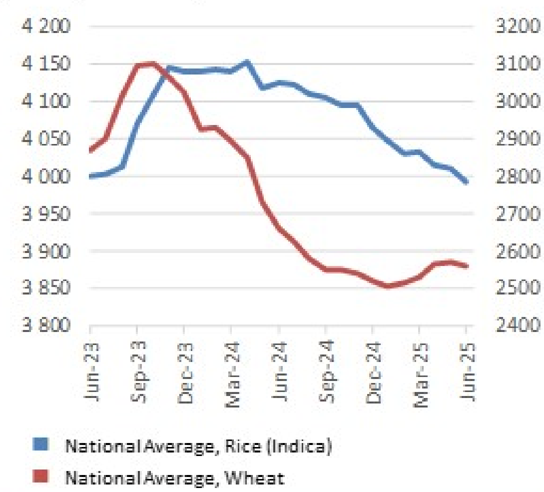


Notes: Includes rice in milled terms. Split years refer to individual crop marketing years (for rice, calendar year of second year shown).

China

wholesale prices of wheat and rice

yuan or yuan renminbi per tonne



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Food and Agriculture Organization
of the United Nations

GIEWS Country Brief
The People's Republic of China (mainland)

Reference Date: 13-March-2025

FOOD SECURITY SNAPSHOT
- **Favourable production prospects for 2025 wheat crop**
- **Record cereal production estimated in 2024**
- **Cereal imports forecast well below average in 2024/25**
- **Domestic prices of wheat and rice below year-on-year levels last February**

Favourable production prospects for 2025 wheat crop

Planting of the 2025 main *winter* wheat crop, accounting for about 90 percent of the annual output, finalized last October and its harvest will take place from May onwards. The area planted is estimated above the five-year average, mostly supported by government incentives, including a minimum support price for the wheat crop and subsidies to purchase agricultural inputs. Field assessments from end-February 2025 indicated favourable growing conditions for the wheat crop, which has recently broken dormancy in northern parts of the country, while it is already at tillering to jointing stages of development in eastern and central parts. Planting of the 2025 minor *spring* wheat crop is ongoing under overall favourable weather conditions and its harvest is expected to start in July.

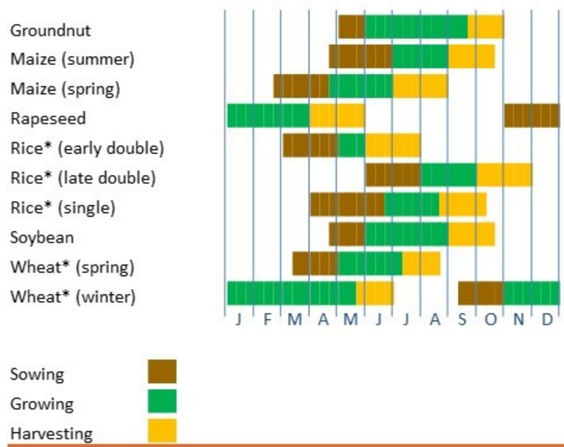
China's new food security law came into effect in June 2024 and aims to ensure the supply of grain and related products by protecting farmland, limiting land conversion and supporting farmers' incomes. This law also highlights the need to reduce food waste and enhance grain production capabilities to address the country's growing grain demand.

Record cereal production estimated in 2024

The 2024 cropping season finalized last November and the aggregate cereal output is estimated at a record level of 652 million tonnes. Maize crop production is estimated at a record level of 295 million tonnes, mainly due to large sowings driven by strong demand by the feed industry. Yields are estimated to be above the average level due to the widespread use of high-yielding seed varieties and favourable weather conditions in North China Plain, where about 80 percent of the maize crop is grown. Some localized crop losses occurred in southern areas due to flooding. The 2024 paddy crop production is estimated at 207.5 million tonnes slightly up from the 2023

China

Crop Calendar *(*major foodcrop)*



China

Cereal Production

	2019-2023 average	2023	2024 estimate	change 2024/2023
		000 tonnes		percent
Maize	272 009	288 842	294 917	2.1
Rice (paddy)	209 882	206 603	207 535	0.5
Wheat	135 821	136 590	140 099	2.6
Others	9 822	9 789	9 605	-1.9
Total	627 533	641 824	652 156	1.6

Note: Percentage change calculated from unrounded data.

level. Some localized crop losses occurred in southern main paddy producing areas due to flooding caused by heavy rains between July and September 2024, and the passage of Typhoon Yagi in late September. Wheat crop production is estimated to be at an above-average level of 140.1 million tonnes in 2024 as an above-average *winter* season output fully offset the losses of the *spring* season crops caused by excessive rainfall during the harvest.

Cereal imports forecast well below average in 2024/25

Total cereal import requirements in the 2024/25 marketing year are forecast at a well below-average level of 37.5 million tonnes reflecting ample carryover stocks following large imports in 2023/24 and the record cereal production harvested in 2024. Imports of maize are forecast at 10 million tonnes in the 2024/25 marketing year (October/September), about half the average level. Imports of wheat are forecast at 7 million tonnes in the 2024/25 marketing year (July/June), about 30 percent below the average. Imports of sorghum are forecast at an average level of 7.2 million tonnes in the 2024/25 marketing year (October/September). Imports of barley in the 2024/25 marketing year (July/June) are expected to exceed the average, reaching 11 million tonnes, as low international prices will encourage purchases from abroad.

Domestic prices of wheat and rice lower year-on-year last February

Wholesale prices of wheat grain showed a steady declining trend throughout 2024 due to ample market availability from the above-average harvest attained in 2024 and the large volume of imports in the 2023/24 marketing year. In January and February 2025, prices were generally stable at levels of about 15 percent lower year-on-year.

Wholesale prices of *Indica* and *Japonica* rice have been declining since mid-2024 and, as of February 2025, they were slightly below their year-earlier level, reflecting an adequate market availability.

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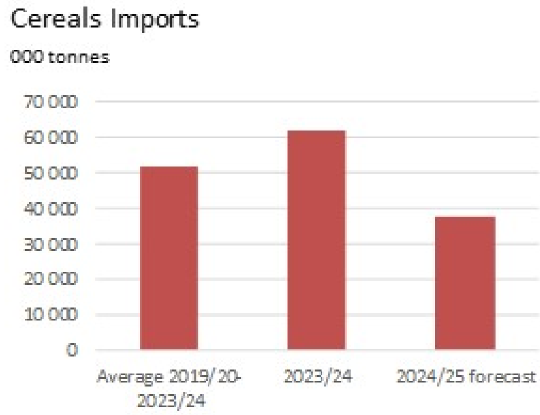
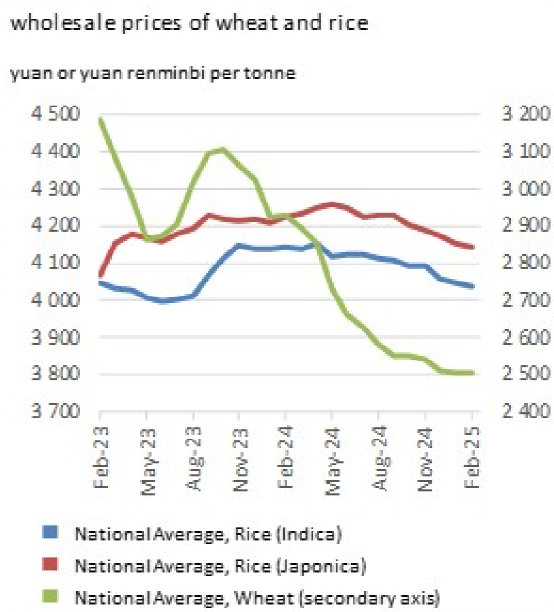
China



Notes: Includes rice in milled terms. Split years refer to individual crop marketing years (for rice, calendar year of second year shown).

China



Food and Agriculture Organization
of the United Nations

GIEWS Country Brief
The People's Republic of China (mainland)

Reference Date: 29-October-2024

FOOD SECURITY SNAPSHOT
- **Planting of 2025 winter wheat crop ongoing**
- **Above-average cereal output forecast in 2024**
- **Above-average cereal imports forecast in 2024/25**
- **Domestic prices of wheat grain decreased since late 2023, while prices of rice remained stable**

Planting of 2025 winter wheat crop ongoing

Planting of the 2025 main *winter* wheat crop, accounting for about 90 percent of the annual output, is ongoing under generally favourable weather conditions and crops will be harvested from May 2025. Area planted is forecast above the five-year average, mostly underpinned by incentive measures put in place by the government, which includes a minimum support price for the wheat crop and subsidies to purchase agricultural inputs. The 2025 minor *spring* wheat crop will be planted from March next year.

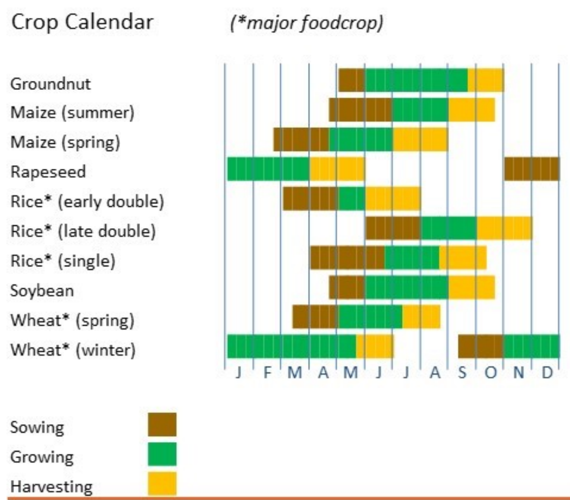
China's new food security law came into effect in June 2024 and aims to ensure the supply of grain and related products by protecting farmland, limiting land conversion and supporting farmers' incomes. This law also highlights the need to reduce food waste and enhance grain production capabilities to address the country's growing grain demand.

Above-average cereal output forecast in 2024

The 2024 paddy cropping season will finalize at the end of November with the harvest of the *late double* paddy crop, which accounts for 15 percent of the total output. The 2024 *early double* and *single* paddy crops, accounting for 15 percent and 65 percent, respectively, of total production, were harvested earlier in the year. Aggregate 2024 paddy production is forecast at 207.4 million tonnes, marginally higher than the previous year, reflecting small increases in both planted area and yields. However, some localized crop losses occurred in southern main paddy producing areas, due to flooding from heavy rains between July and September 2024, and the passage of Typhoon Yagi in late September.

Harvesting of the 2024 main *summer* maize crop has recently concluded, while the secondary *spring* crop was harvested in August 2024. Aggregate 2024 maize production is estimated at 292 million tonnes, 7 percent above the five-year average, mainly due to large sowings driven by strong demand from the feed

China



China

Cereal Production

	2019-2023 average	2023	2024 forecast	change 2024/2023
	000 tonnes			percent
Maize	272 009	288 842	292 000	1.1
Rice (paddy)	209 882	206 603	207 370	0.4
Wheat	135 821	136 590	140 070	2.5
Others	9 741	9 553	9 605	0.5
Total	627 451	641 588	649 045	1.2

Note: Percentage change calculated from unrounded data.

industry. In the North China Plain, where about 80 percent of the maize crop is grown, above-average yields were obtained due to generally favourable weather conditions. Some localized crop losses occurred in southern areas due to flooding.

Production of the 2024 wheat crop, harvested in August, is estimated to be slightly above average at 140.1 million tonnes, as an above-average *winter* season output fully offset the losses of *spring* season crops caused by excessive rainfall amounts during harvest.

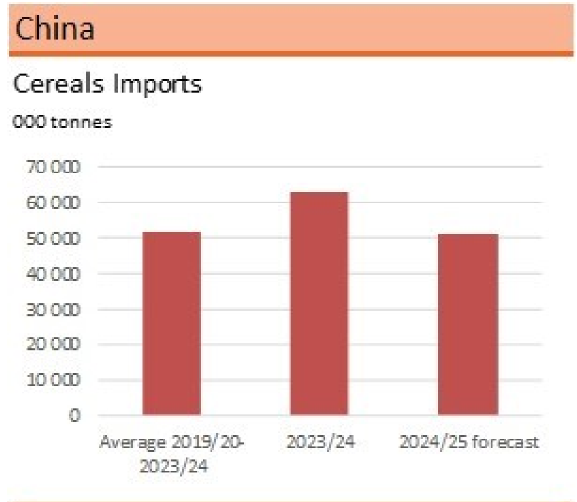
Average cereal imports forecast in 2024/25

Total cereal imports in the 2024/25 marketing year are expected at an average level of 52.6 million tonnes, as the increasing demand will be covered by ample carryover stocks following high imports in 2023/24 and the above-average production harvested in 2024. Imports of maize are forecast at an average level of 20 million tonnes in the 2024/25 marketing year (October/September). Imports of wheat are forecast at an average level of 10 million tonnes in the 2024/25 marketing year (July/June). By contrast, imports of barley in the 2024/25 marketing year (July/June) are expected to exceed the average, reaching 12.9 million tonnes, as low international prices will encourage purchases from abroad.

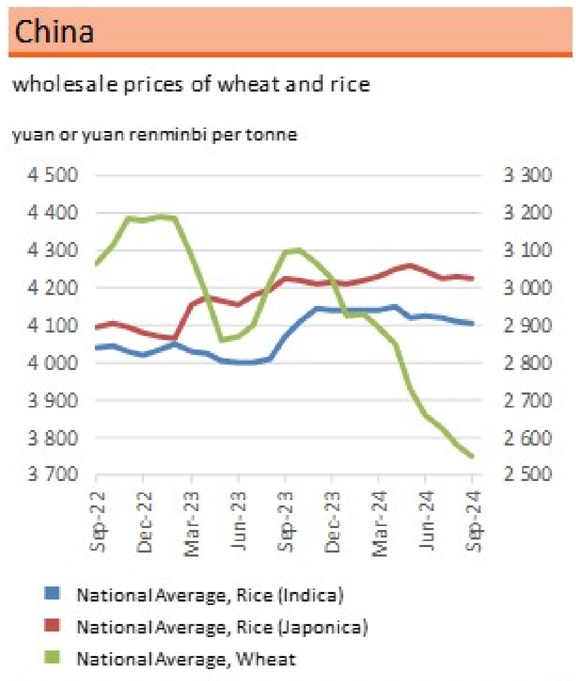
Domestic prices of wheat grain decreased since late 2023, while prices of rice remained stable

Wholesale prices of wheat grain have been declining since late 2023 and as of September 2024 were about 10 percent lower year-on-year, mainly due to ample market supply from the bumper harvest attained in 2024.

Wholesale prices of *Indica* and *Japonica* rice, the most consumed varieties, have remained generally stable since early 2024 and as of September 2024, were close to their levels from a year earlier, reflecting adequate market availability.



Notes: Includes rice in milled terms. Split years refer to individual crop marketing years (for rice, calendar year of second year shown).



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Food and Agriculture Organization of the United Nations

GIEWS Country Brief
The People's Republic of China (mainland)

Reference Date: 29-March-2024

FOOD SECURITY SNAPSHOT

- **Production prospects for 2024 winter wheat crops generally favourable**
- **Above-average cereal output estimated in 2023**
- **Above-average cereal imports forecast in 2023/24**
- **Domestic prices of rice and wheat flour in February 2024 close to previous year's level**

Production prospects for 2024 winter wheat crops generally favourable

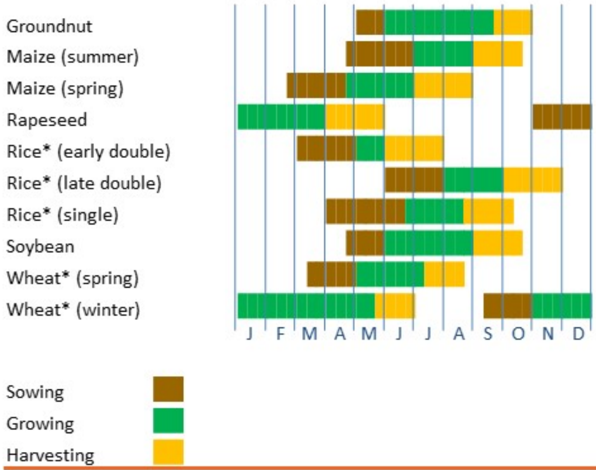
Planting of the 2024 winter wheat crop, accounting for about 90 percent of the annual output, finalized in October 2023 and the area planted is estimated at a near-average level of 22.3 million hectares. Crops have recently broken dormancy in northern parts of the country, while they are already at tillering to jointing stages of development in eastern and central parts, and production prospects are generally favourable. Planting of the minor spring wheat crop is ongoing under overall favourable weather conditions and its harvest is expected to start in July 2024.

Above-average cereal output estimated in 2023

The 2023 cropping season concluded in November 2023 and aggregate cereal output is estimated at an above-average level of 641 million tonnes. Maize output is estimated at 288.8 million tonnes, 9 percent above the five-year average, due to large sowings driven by the strong demand of the feed industry and above-average yields. In North China Plain, where about 80 percent of the maize is grown, above-average yields were obtained due to generally favourable weather conditions. Some localized crop losses occurred in southern areas due to dry weather conditions in May and June 2023as well as in northeastern areas due to heavy rains and strong winds brought by several storms and typhoons between July and September 2023. Paddy production is estimated at 206.6 million tonnes, reflecting yield improvements relative to last year's weather-affected levels, which were offset by a contraction in area planted. However, heavy rains and strong winds, due to several storms and typhoons between July and September 2023, caused localized crop losses in northeastern producing areas, especially in Jilin, Heilongjiang and Liaoning provinces. Production of wheat is estimated at a near-average level of 136.6 million tonnes.

China

Crop Calendar (*major foodcrop)



China

Cereal Production

	2018-2022 average	2022	2023 estimate	change 2023/2022
	000 tonnes			percent
Maize	265 675	277 203	288 842	4.2
Rice (paddy)	210 987	208 495	206 603	-0.9
Wheat	134 792	137 723	136 590	-0.8
Others	10 455	10 269	10 409	1.4
Total	621 908	633 690	642 444	1.4

Note: Percentage change calculated from unrounded data.

Above-average cereal imports forecast in 2023/24

Total cereal imports in the 2023/24 marketing year are forecast at a well above-average level of 60.3 million tonnes, primarily reflecting the strong demand for coarse grains by the domestic feed industry. Imports of maize are forecast at a well above-average level of 27.5 million tonnes in the 2023/24 marketing year (October/September). Barley and sorghum imports are forecast at high levels of 12 million and 7.2 million tonnes, respectively. Wheat imports in the 2023/24 marketing year (July/June) are forecast at 10.7 million tonnes, 28 percent above the five-year average as wheat grain is often used as feed in substitution of maize.

Domestic prices of rice and wheat flour in February 2024 close to previous year's level

Wholesale prices of *indica* and *japonica* rice, widely consumed varieties, were generally stable between November 2023 and February 2024, reflecting an adequate market availability. Similarly, an adequate domestic availability has kept wholesale prices of wheat flour stable since May 2023. Overall, in February 2024, domestic prices of rice and wheat flour were close to the previous year's level.

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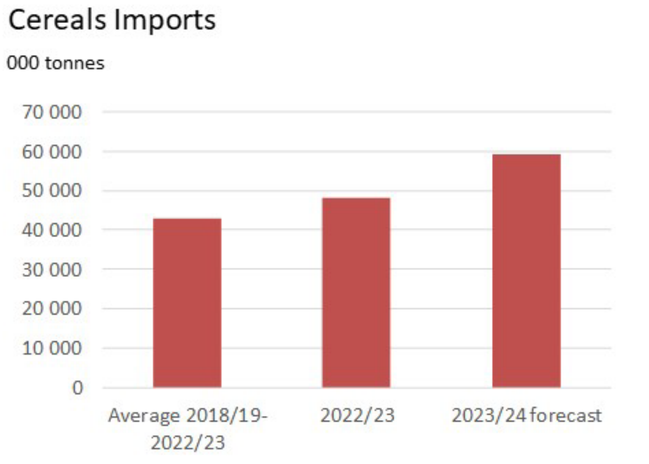
China



Notes: Includes rice in milled terms. Split years refer to individual crop marketing years (for rice, calendar year of second year shown).

Food and Agriculture Organization of the United Nations

GIEWS Country Brief
The People's Republic of China (mainland)

Reference Date: 20-November-2023

FOOD SECURITY SNAPSHOT
- **Above-average sowings estimated for 2024 winter wheat crop**
- **Cereal production forecast at slightly above-average level in 2023**
- **Above-average cereal imports forecast in 2023/24**
- **Domestic prices of wheat grain and rice close to last year's level**

Above-average sowings estimated for 2024 winter wheat crop

Planting of the 2024 winter wheat crop, accounting for about 90 percent of the annual production, concluded in October, supported by adequate soil moisture levels. The area sown is estimated above last year's near-average level, underpinned by strong domestic demand in part reflecting the recovery in economic activities after the COVID-19 pandemic. Warm weather conditions prevailed in September and October benefitting the establishment of wheat crops.

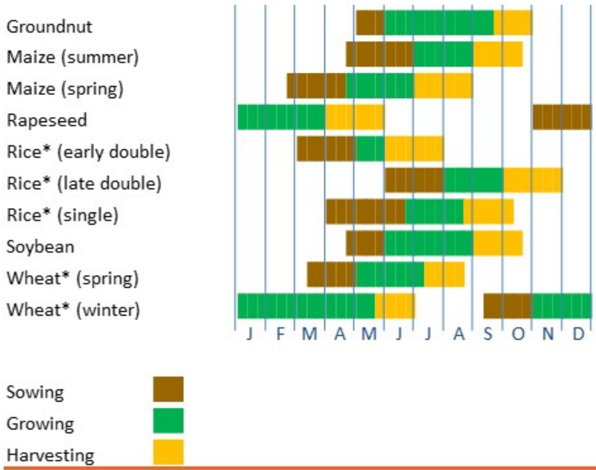
Cereal production forecast at slightly above-average level in 2023

The 2023 paddy cropping season will finalize at the end of November, with the harvest of the late double paddy crop. FAO forecasts aggregate paddy production at close to 209 million tonnes, reflecting expectations of some yield improvements relative to last year's weather-affected levels, which are anticipated to offset a slight contraction in area planted. However, heavy rains and strong winds, due to several storms and typhoons between July and September 2023, caused localized crop losses in northeastern producing areas, especially in Jilin, Heilongjiang and Liaoning provinces.

Harvesting of the 2023 maize crop finalized last October and the output is estimated at 285 million tonnes, 7 percent above the five-year average, mostly due to large sowings driven by the strong demand of the feed industry. In the North China Plain, where about 80 percent of the maize is grown, above-average yields were obtained owing to generally favourable weather conditions. Localized crop losses occurred in southern areas due to dry weather conditions in May and June as well as in northeastern areas due to the negative effects of storms and typhoons.

China

Crop Calendar (*major foodcrop)



China

Cereal Production

	2018-2022 average	2022	2023 estimate	change 2023/2022
		000 tonnes		percent
Maize	265 675	277 203	285 000	2.8
Rice (paddy)	210 987	208 495	208 884	0.2
Wheat	134 792	137 723	136 540	-0.9
Others	10 455	10 269	10 514	2.4
Total	621 908	633 690	640 938	1.1

Note: Percentage change calculated from unrounded data.

Production of the 2023 wheat crop, harvested last August, is estimated at a near-average level of 137 million tonnes, as an above-average winter season output almost entirely offset the losses of spring season crops due to excessive rainfall amounts at harvest time.

Overall, aggregate cereal production is forecast at a slightly above-average level of 641 million tonnes.

Above-average cereal imports forecast in 2023/24

Total cereal imports in the 2023/24 marketing year are forecast at a well above-average level of 50 million tonnes, primarily reflecting strong demand for coarse grains by the feed industry. Imports of maize are forecast at 20 million tonnes in the 2023/24 marketing year (October/September), 23 percent above the average. Barley and sorghum imports are forecast at high levels of 8 million and 7 million tonnes, respectively. Growing demand by the feed industry is also expected to keep imports of wheat grain at high levels as wheat is often used as a substitute of maize. Wheat imports in the 2023/24 marketing year (July/June) are forecast at 10 million tonnes, more than 20 percent above the five-year average, reflecting strong demand by the feed industry as wheat grain is often used as a substitute of maize.

Domestic prices of wheat grain and rice close to last year's level

Domestic prices of Indica and Japonica rice were generally stable throughout 2023, reflecting good market availability from the near-average production harvested in 2022 and 2023. Prices strengthened marginally since last July and, in October, they were close to their year-earlier levels.

After declining in the first quarter of 2023, domestic prices of wheat grain increased marginally between May and July 2023, due to concerns about the negative effects of heavy rains on the output of spring crops. Last October, wheat grain prices were close to their year-earlier levels.

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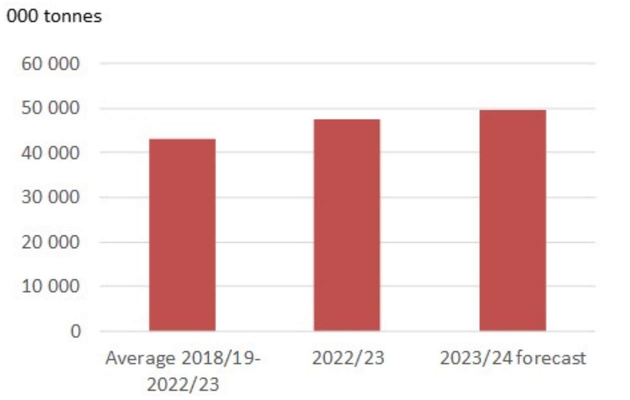
This brief was prepared using the following data/tools:
FAO/GIEWS Country Cereal Balance Sheet (CCBS)
https://www.fao.org/giews/data-tools/en/.
FAO/GIEWS Food Price Monitoring and Analysis (FPMA) Tool
https://fpma.fao.org/.
FAO/GIEWS Earth Observation for Crop Monitoring
https://www.fao.org/giews/earthobservation/.
Integrated Food Security Phase Classification (IPC) https://www.ipcinfo.org/.

China

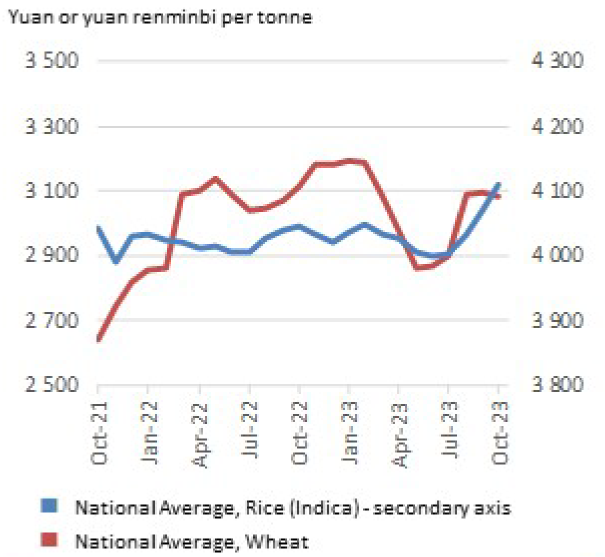
Cereals Imports



Notes: Includes rice in milled terms. Split years refer to individual crop marketing years (for rice, calendar year of second year shown).

China

Wholesale prices of wheat and rice



Food and Agriculture Organization of the United Nations

GIEWS Country Brief
China (mainland)

Reference Date: 13-October-2022

FOOD SECURITY SNAPSHOT

- **Cereal production forecast at slightly above-average level in 2022**
- **Cereal imports in 2022/23 forecast well above average**
- **Domestic wheat grain prices at high levels in 2022 due to strong demand for feed**

Cereal production forecast at slightly above-average level in 2022

Harvesting of the 2022 maize crop finalized in October and the output is estimated at 275 million tonnes, 5 percent above the five-year average level. The bumper output is predominantly driven by a price-induced expansion in sowings, while yields are estimated at an average level.

Harvesting of the 2022 early paddy crop concluded in August, while harvesting of the intermediate and late paddy crops is ongoing and will finalize in November. The 2022 paddy production is forecast at a near-average level of 211.9 million tonnes, as a slight year-on-year decline in yields is expected to be partially offset by a small area expansion.

The harvest of the 2022 wheat crop was completed in August and the production is estimated at 138.4 million tonnes, slightly above the five-year average, due to bumper yields reflecting generally favourable weather conditions.

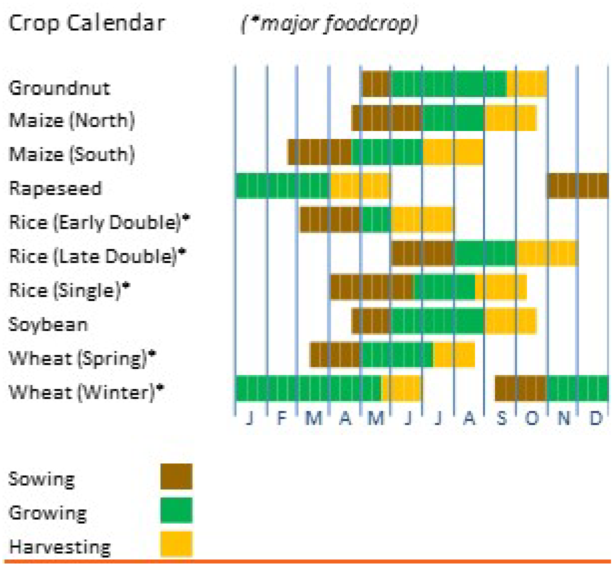
Overall, aggregate cereal production is forecast at a slightly above-average level of 635.6 million tonnes.

Cereal imports in 2022/23 forecast well above average

Total cereal imports in the 2022/23 marketing year are forecast at about 48 million tonnes, well above the five-year average, but more than 20 percent below the unpreceded high level attained in 2020/21 and 2021/22. The large level of imports reflects primarily the strong demand for feed driven by the growth of the livestock sector.

Imports of maize, mostly for feed, are forecast at 18 million tonnes in the 2022/23 marketing year (October/September), 30 percent above the five-year average. Similarly, imports of other feed crops, namely barley and sorghum, are forecast at high levels. The growing demand by the feed industry is also

China



Source: FAO/GIEWS.

China

Cereal Production

	2017-2021 average	2021	2022 forecast	change 2022/2021
	000 tonnes			percent
Maize	262 049	272 550	275 000	0.9
Rice (paddy)	211 823	212 843	211 910	-0.4
Wheat	134 114	136 946	138 420	1.1
Others	9 526	10 510	10 269	-2.3
Total	617 512	632 849	635 599	0.4

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

expected to keep imports of wheat grain at high levels as wheat is often used as a substitute of maize. Wheat imports in the 2022/23 marketing year (July/June) are forecast to reach 7.8 million tonnes, more than 20 percent above the five-year average.

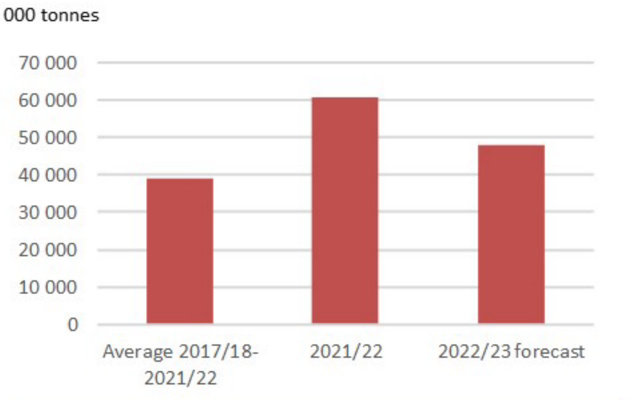
Domestic wheat grain prices at high level in 2022 due to strong demand for feed

Domestic prices of wheat grain have generally increased from July 2020 to May 2022, supported by strong demand for from the feed sector. Prices have declined slightly in June and July following the 2022 harvest. In September, wheat grain prices were at high levels in most markets.

Domestic prices of Indica and Japonica rice have been generally stable throughout 2022, reflecting good market availabilities from the 2021 harvests.

China

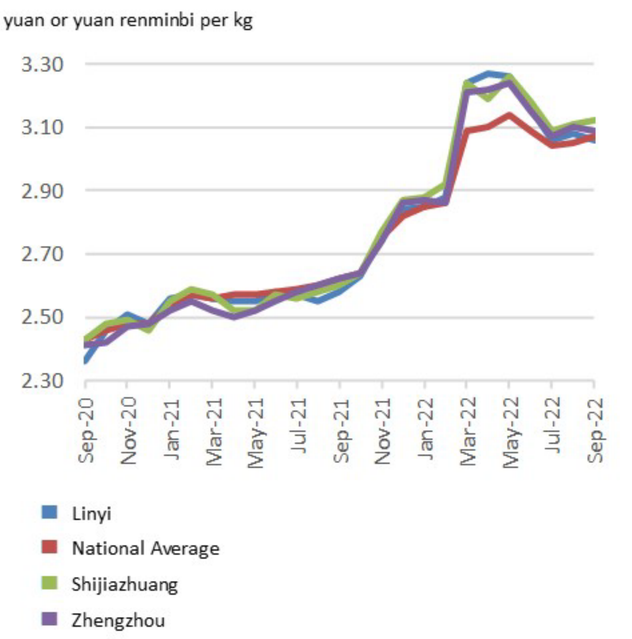
Cereals Imports



Notes: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

China

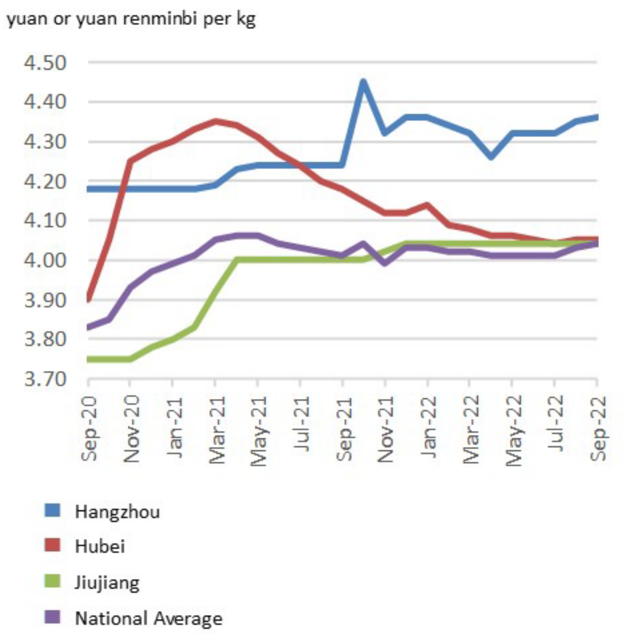
Wholesale prices of Wheat



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

China

Wholesale prices of Rice (Indica)



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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Food and Agriculture Organization of the United Nations

GIEWS Country Brief
China (mainland)

Reference Date: 11-March-2022

FOOD SECURITY SNAPSHOT

- **Area planted with 2022 winter wheat estimated at above-average level**
- **Cereal production above average in 2021**
- **Cereal imports in 2021/22 well above average**
- **Domestic maize and wheat grain prices at high levels in 2021 due to strong feed demand**

Area planted with 2022 winter wheat estimated at above-average level

Planting of the 2022 main winter wheat crop, which accounts for more than 90 percent of the annual wheat production, was completed last October and the harvest is expected to start in May. The area planted is estimated to be at an above-average level. Abundant rains in September caused floods in parts of the main wheat producing areas located in North China Plain and central provinces, delayed panting activities by about two weeks. Weather conditions improved from October onwards, allowing planting operations to pick up and supported germinating crops. Currently, the wheat crop is mostly in jointing stages of development in northern and central parts of the country, while it is at heading stages in southern areas. According to field assessment reports, as of early March 2022, wheat crop conditions and soil moisture were near average in the main producing areas. The minor 2022 spring wheat crop will be planted from March onwards.

Cereal production above average in 2021

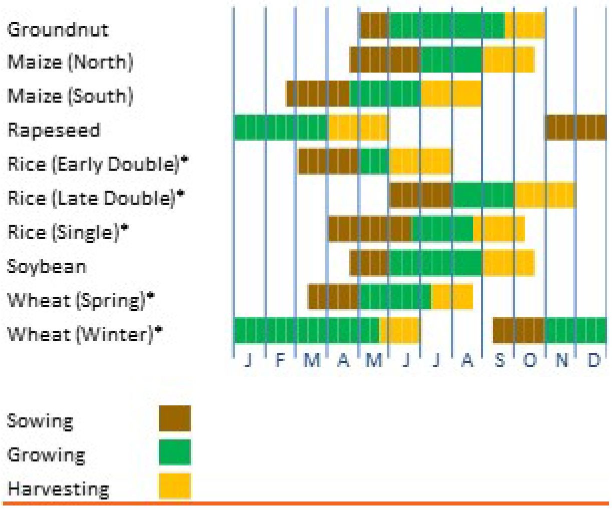
The 2021 cropping season was concluded last November. Aggregate cereal production is estimated at an above-average level of 632 million tonnes, mostly due to an increase in production of maize and wheat, reflecting an expansion in area planted, mostly prompted by high national prices.

Cereal imports in 2021/22 well above average

Total cereal imports in the 2021/22 marketing year are forecast at about 58.5 million tonnes, well above their last five-year average, but almost 10 percent below the unpreceded high level of the 2020/21 marketing year. The large level of imports reflect higher demand for feed crops, driven by the recovery in domestic pork production after the African Swine Fever (ASF)[1] outbreaks in 2018 and 2019 and the strong growth of the poultry, dairy and

China

Crop Calendar (*major foodcrop)



Source: FAO/GIEWS.

China

Cereal Production

	2016-2020 average	2020	2021 estimate	change 2021/2020
	000 tonnes			percent
Maize	260 260	260 665	272 550	4.6
Rice (paddy)	211 473	211 857	212 843	0.5
Wheat	133 378	134 248	136 950	2.0
Others	9 100	9 213	9 165	-0.5
Total	614 211	615 983	631 508	2.5

Note: Percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

[1] African Swine Fever is a highly contagious and lethal disease affecting pigs and wild boars.

starch sectors. Imports of maize, mostly for feed, are forecast at a near-record level of 23.5 million tonnes in the 2021/22 marketing year (October/September). Similarly, imports of other feed crops, namely barley and sorghum, are forecast at the high level of 10.3 and 10 million tonnes, respectively. Growing demand by the feed industry is also expected to result in an increase in wheat grain imports, set to reach 9.5 million tonnes, more than 70 percent above the five-year average, as wheat is often used as a substitute of maize. Imports of rice in the 2022 calendar year are forecast at 4.5 million tonnes, 12 percent below the 2021 level.

Domestic maize and wheat grain prices at high level in 2021 due to strong feed demand

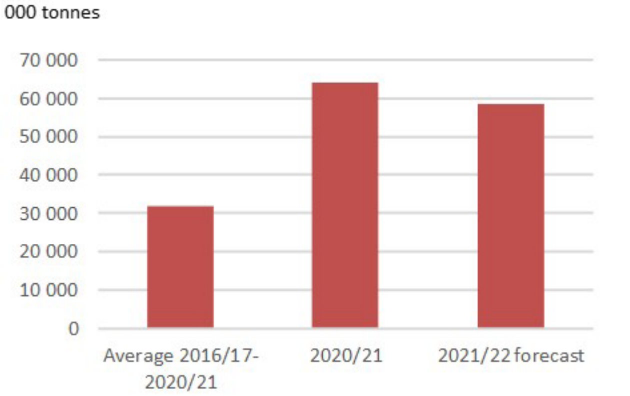
Prices of maize increased sharply throughout 2020 and during the first months of 2021, reaching record levels in March, due to the strong growth in demand from the feed sector. Then, prices slightly decreased until October 2021 due to the arrival on markets of the 2021 main season harvest, but started to rise again in November.

Domestic prices of wheat have been generally increasing since mid-2020, supported by strong demand for food and feed consumption. In January 2022, wheat grain and wheat flour prices were at record or near-record levels in most markets.

Domestic prices of Indica and Japonica rice have been generally stable throughout 2021, reflecting good market availabilities from the 2021 harvests.

China

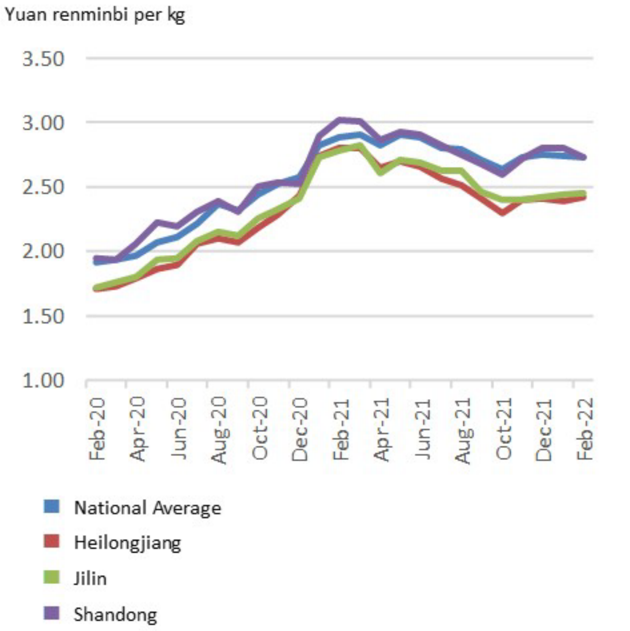
Cereals Imports



Notes: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

China

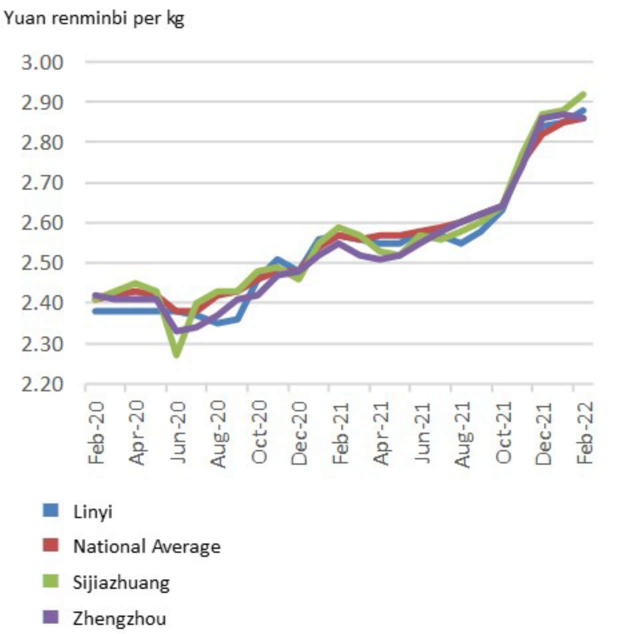
Wholesale maize (feed) prices



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

China

Wholesale prices of Wheat



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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Food and Agriculture Organization of the United Nations

GIEWS Country Brief
China (mainland)

Reference Date: 23-February-2022

FOOD SECURITY SNAPSHOT
- **Area planted with 2022 winter wheat estimated at above-average level**
- **Cereal production above average in 2021**
- **Cereal imports in 2021/22 well above average**
- **Domestic maize and wheat grain prices at high level in 2021 due to strong feed demand**

Area planted with 2022 winter wheat estimated at above-average level

Planting of the 2022 main winter wheat crop, which accounts for more than 90 percent of the annual wheat production, was completed last October and the harvest is expected to start in May. The area planted is estimated at an above-average level. The increases in planted area were reported in the important wheat producing provinces of Hebei, Henan, Shandong and Jiangsu. Weather conditions have been favourable since last September, supporting planting activities and germinating crops. Currently, the wheat crop is mostly in dormancy in northern parts of the country, while it is at tillering to jointing stages of development in eastern and central areas. According to field assessment reports, as of late January 2022, wheat crop conditions and soil moisture were near average in the main producing areas. The minor 2021 spring wheat crop will be planted from March onwards.

Cereal production above average in 2021

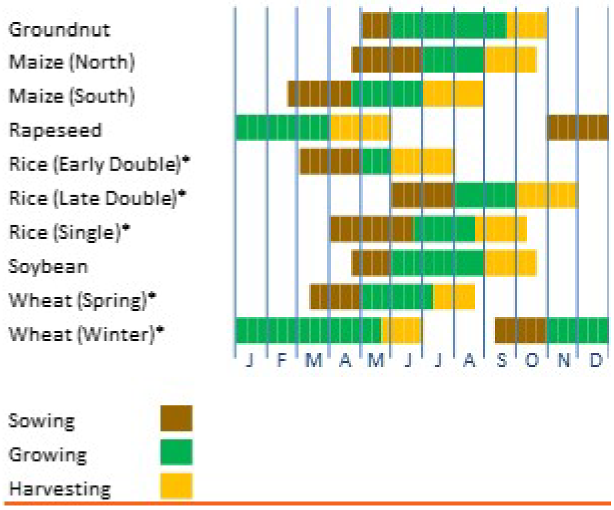
The 2021 cropping season was concluded last November. The aggregate cereal production is estimated at an above-average level of 632 million tonnes, mostly due to an increase in production of maize and wheat, reflecting an expansion in area planted, mostly prompted by high domestic prices.

Cereal imports in 2021/22 well above average

Total cereal imports in the 2021/22 marketing year are forecast at about 58.5 million tonnes, well above the last five-year average, but almost 10 percent below the unpreceded high level of the 2020/21 marketing year. The large level of imports reflect the higher demand for feed crops, driven by the recovery in domestic pork production after the African Swine Fever (ASF)[1] outbreaks in 2018 and 2019 and the strong growth of the poultry, dairy and starch sectors. Imports of maize, mostly for feed, are forecast at

China

Crop Calendar *(*major foodcrop)*



Source: FAO/GIEWS.

China

Cereal Production

	2016-2020 average	2020	2021 estimate	change 2021/2020
	000 tonnes			percent
Maize	260 260	260 665	272 550	4.6
Rice (paddy)	211 473	211 857	212 843	0.5
Wheat	133 378	134 248	136 950	2.0
Others	9 100	9 213	9 165	-0.5
Total	614 211	615 983	631 508	2.5

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

[1] African Swine Fever is a highly contagious and lethal disease affecting pigs and wild boars.

a near-record level of 23.5 million tonnes in the 2021/22 marketing year (October/September). Similarly, imports of other feed crops, namely barley and sorghum, are forecast at high level of 10.3 and 10 million tonnes, respectively. The growing demand by the feed industry is also expected to result in an increase in wheat grain imports, set to reach 9.5 million tonnes, more than 70 percent above the five-year average, as wheat is often used as a substitute of maize. Imports of rice in the 2022 calendar year are forecast at 4.5 mlillion tonnes, 12 percent below the 2021 level.

Domestic maize and wheat grain prices at high level in 2021 due to strong feed demand

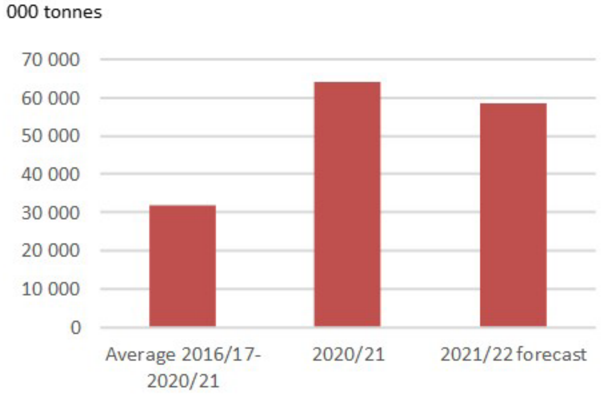
Prices of maize increased sharply throughout 2020 and during the first months of 2021, reaching record levels in March, due to the strong growth in demand from the feed sector. Then, prices slightly decreased until October 2021, due to the arrival on markets of the 2021 main season harvest, but started to rise again in November.

Domestic prices of wheat have been generally increasing since mid-2020, supported by the strong demand for food and feed consumption. In January 2022, wheat grain and wheat flour prices were at record or near-record levels in most markets.

Domestic prices of Indica and Japonica rice have been generally stable throughout 2021, reflecting good market availabilities from the 2021 harvests.

China

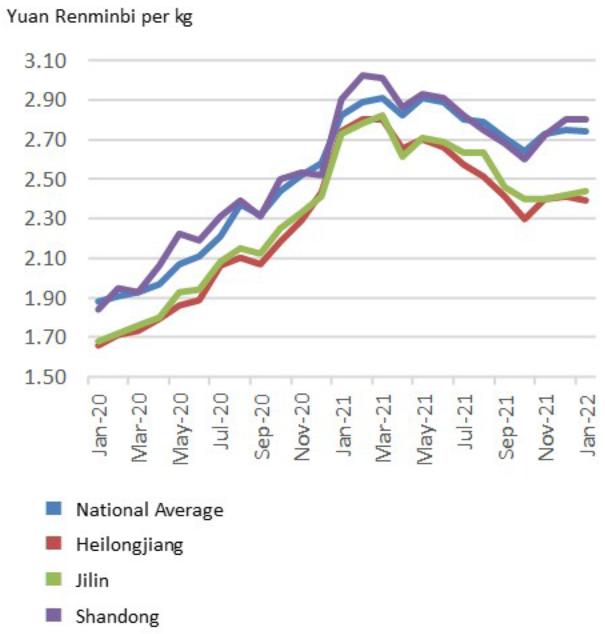
Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

China

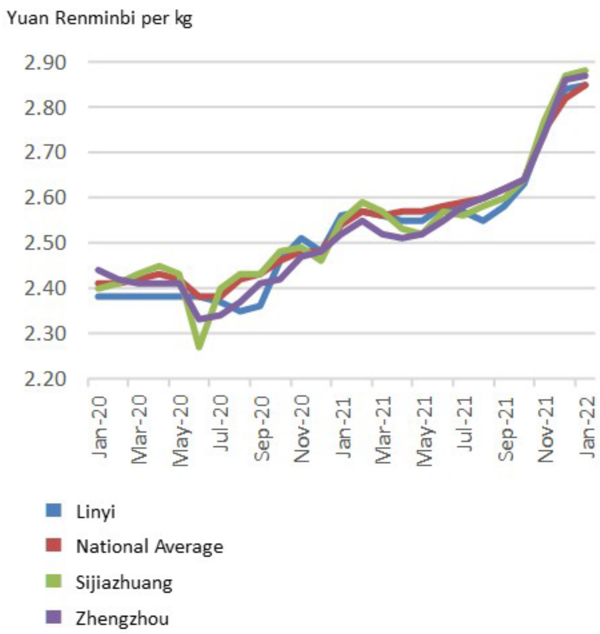
Wholesale maize (feed) prices



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

China

Wholesale prices of Wheat



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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GIEWS Country Brief
China (Mainland)

Reference Date: 17-February-2021

FOOD SECURITY SNAPSHOT
- **Area planted with 2021 winter wheat estimated close to average level**
- **Near-average cereal production obtained in 2020**
- **Cereal imports in 2020/21 likely to reach an all-time high**
- **Domestic maize prices increased sharply in 2020 on strong feed demand**

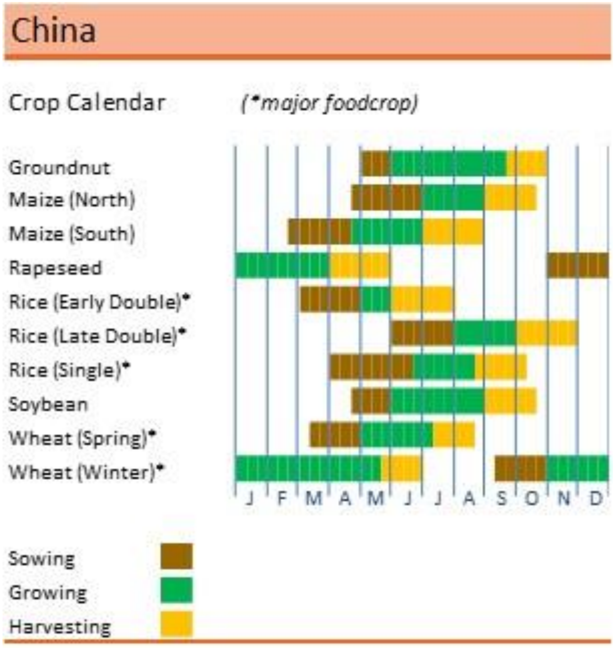
Area planted with 2021 winter wheat estimated close to average level

Planting of the 2021 main winter wheat, which accounts for more than 90 percent of the annual wheat production, was completed in October and the harvest is expected to start in May. The area planted is estimated at 22.8 million tonnes, close to the previous year's average level. Precipitation amounts between September and November 2020 have been average to above average over the main producing areas in the North China Plain and in the eastern and central parts of the country, replenishing soil moisture and creating conductive conditions for planting activities and germinating crops. In the northern parts of the country, the wheat crop entered dormancy in December, while in the eastern and central parts the wheat crop is currently at tillering to jointing stages of development. According to field assessment reports, as of early January 2021, wheat crop conditions and soil moisture were near average throughout the country. The minor 2021 spring wheat crop will be planted from March onwards.

Near-average cereal production obtained in 2020

The 2020 cropping season was concluded in November and the aggregate cereal production is estimated at 616 million tonnes, close to the five-year average.

Movement restrictions and negative economic effects associated with the COVID-19 pandemic apparently did not cause major disruptions to agricultural activities in general. Flood damages to standing rice and wheat crops in June and July were reported in southern crop producing areas. Heavy rains and strong wind, due to typhoons in late August and early September, caused localized damages to the ready-to-be harvested maize crops in the main producing areas located in northeastern parts of the country.



Source: FAO/GIEWS.

China

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Maize	261 124	260 770	260 673	0.0
Rice (paddy)	211 530	209 610	211 857	1.1
Wheat	133 056	133 593	134 248	0.5
Others	9 078	9 173	9 232	0.6
Total	614 788	613 146	616 010	0.5

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

Cereal imports in 2020/21 likely to reach record level

Total cereal imports in the 2020/21 marketing year are likely to increase to an unprecedented high level of almost 45 million tonnes, exceeding the five-year average by 80 percent. The largest increase is foreseen in imports of maize for feed, mostly driven by the recovery in domestic pork production following the African Swine Fever (ASF)[1] in 2018 and 2019 as well as the strong growth in the poultry, dairy and starch sectors. The strong demand has caused a surge in domestic maize prices, encouraging a strong pace of import orders for cheaper maize imports, as well as cheaper priced feed-quality wheat, barley and sorghum.

Imports of maize are forecast at a record 20 million tonnes in the 2020/21 marketing year (October/September), almost five times the average level. Similarly, imports of other feed crops, namely barley and sorghum, are forecast at the high level of 7.5 and 6 million tonnes, respectively. Imports of wheat are also projected to rise at about 7.5 million tonnes, the highest level since 2004/05. By contrast, imports of rice in the 2021 calendar year are forecast to decline by 10 percent year on year to 2.8 million tonnes on account of ample domestic availabilities.

Domestic maize prices increased sharply in 2020 on strong feed demand

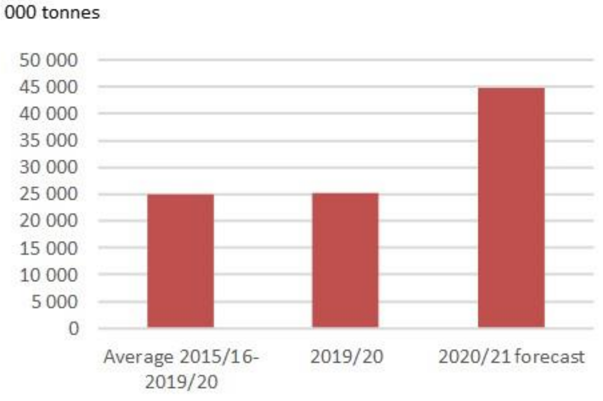
Domestic prices of Indica and Japonica rice were generally stable throughout 2020 in most parts of the country, amid adequate availabilities. However, in some flood-affected southern provinces, prices of rice increased since June 2020.

Prices of maize increased sharply throughout 2020 and, in January 2021, were 50 percent above their year-earlier levels. The persistent upward trend is attributed to strong demand from the feed sector following the recovery in the pig production level after the steep ASF-led contraction registered in the previous two years.

Domestic prices of wheat were generally stable at the beginning of 2020, with some declines in May/June due to the arrival into the markets of the main season harvest. During the second half of 2020, prices of wheat generally increased, supported by the growing demand for food consumption and from the feed industry, as wheat is used as a substitute for maize.

China

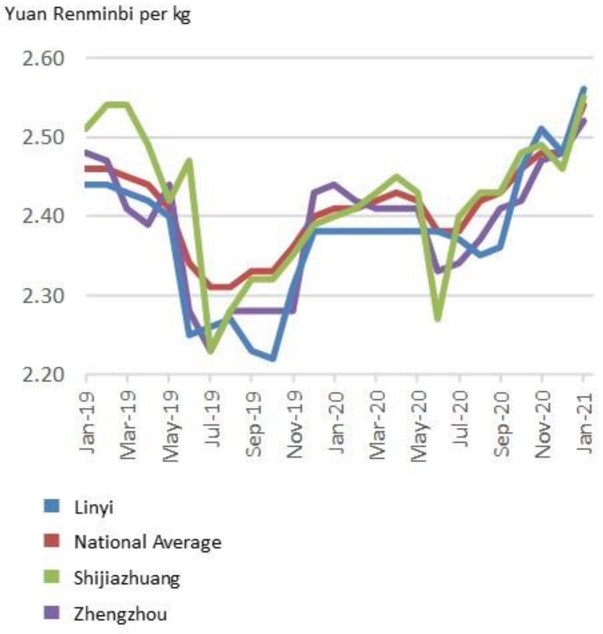
Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

China

Wholesale prices of Wheat



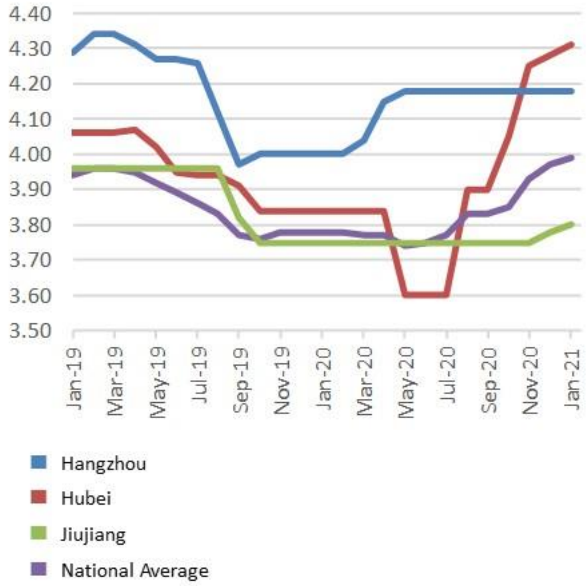
Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

[1] African Swine Fever is a highly contagious and lethal disease affecting pigs and wild boars.

China

Wholesale prices of Rice (Indica)

Yuan Renminbi per kg

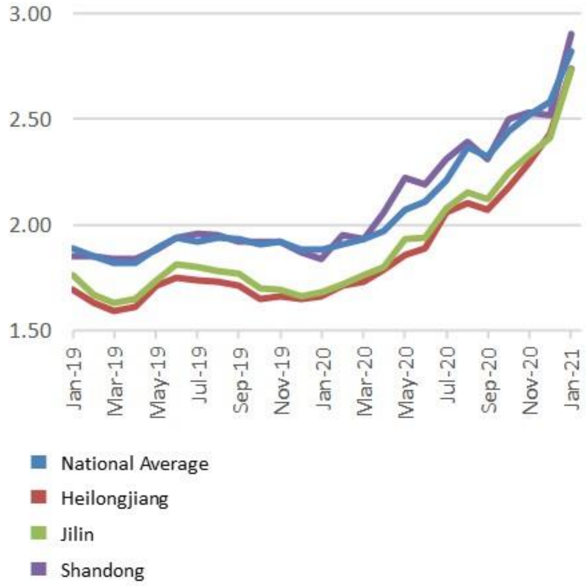


Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

China

Wholesale maize (feed) prices

Yuan Renminbi per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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Food and Agriculture Organization of the United Nations

GIEWS Country Brief
China (Mainland)

Reference Date: 30-June-2020

FOOD SECURITY SNAPSHOT
- **Production of 2020 wheat crop forecast at near-average level**
- **Cereal import requirements in 2019/20 forecast at below-average level**
- **Prices of rice and wheat remained generally stable since beginning of 2020**
- **African Swine Fever outbreak severely affected pig industry in 2018 and 2019**

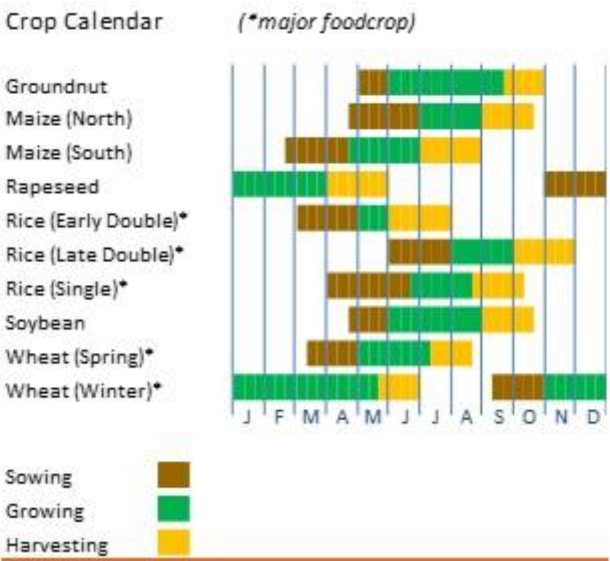
Production of 2020 wheat crop forecast at near-average level

Harvesting of the 2020 main winter wheat crop is ongoing and was completed at the end of June, while harvesting of the spring wheat crop will take place in July and August. Since the beginning of the cropping season in September, precipitation amounts and irrigation water availability have been near the average in most main producing areas. In the northern parts of the country, snow coverage during the winter months has been adequate to protect crops from winterkill and boosted soil moisture during the critical spring months. Localized damages to standing wheat crops were reported in Henan and Hubei provinces, due to below-average rains in April and a cold spell in late spring. The 2020 wheat production is preliminarily forecast at 134 million tonnes, close to the average level.

Harvesting of the 2020 early double rice crop just started, while the single and late double crops, for harvest between September and November, are currently being planted. Overall, the area sown is forecast to stabilize, after contractions registered in 2018 and 2019, as the Government approved, for the first time in six years, an increase in Government purchase prices for Indica paddy.

Planting of the 2020 maize crop was completed in April in the South and will continue until the end of June in the North, where the bulk of the production is concentrated. The planted area is estimated close to the five-year average, mainly driven by Government support measures. Overall, production prospects are favourable as weather conditions were near the average and supported crop development in the main producing areas. According to official information, some concerns remain due to the potential widespread impact of Fall Armyworm (FAW) infestations.

China



Source: FAO/GIEWS.

China

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Maize	258 923	257 174	260 770	1.4
Rice (paddy)	211 530	212 129	209 610	-1.2
Wheat	132 101	131 441	133 593	1.6
Others	9 121	9 008	8 921	-1.0
Total	611 675	609 752	612 894	0.5

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

Cereal import requirements in 2019/20 forecast at below-average level

Total cereal import requirements in the 2019/20 marketing year are forecast at 18.8 million tonnes, about 20 percent below the five-year average.

Imports of rice in 2020 calendar year are forecast at 2.6 million tonnes, about 33 percent below the previous year's level, on account of the ample availabilities from the 2019 paddy harvest and large carryover stocks. Imports of wheat in the 2019/20 marketing year (July/June) are forecast at 3.5 million tonnes, close to the five-year average, due to ample domestic availabilities from large inventories. Among imports of coarse grains in the 2019/20 marketing year (October/September), imports of maize are forecast at 3.5 million tonnes, slightly above the five-year average, reflecting strong demand from the feed industry. By contrast, imports of barley and sorghum are forecast at 5.5 and 2.5 million tonnes, about 20 and 40 percent, respectively, below the five-year average. The expected sharp decline of barley and sorghum imports reflects their substitution by maize for feed use.

Prices of rice and wheat remained generally stable since beginning of 2020

Prices of Indica and Japonica rice were generally stable from January to April 2020 and decreased marginally in May, reflecting adequate market availabilities. Overall, prices of rice in May were below their year earlier levels.

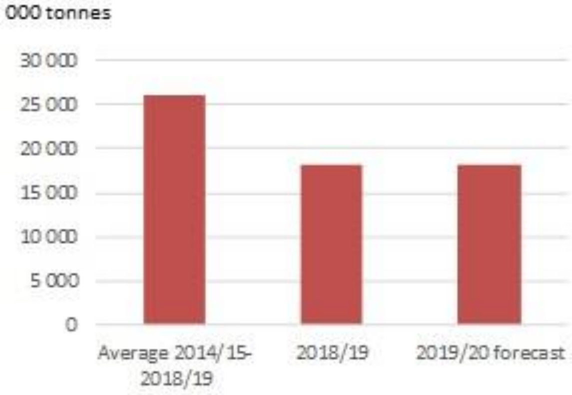
Prices of wheat and wheat flour have been generally stable since the beginning of the year, mainly due to large supplies from the 2019 bumper output and favourable expectations of the 2020 wheat harvest.

African Swine Fever outbreak severely affected pig industry in 2018 and 2019

The country, which is the largest producer and consumer of pork meat in the world, has been severely affected by several African Swine Fever (ASF)[1] outbreaks in 2018 and 2019. In an effort to contain the spread of the disease, the Ministry of Agriculture and Rural Affairs has reported that about 1.2 million pigs were culled since the outbreak started in August 2018. Animal losses due to the ASF has caused substantial reduction of farmers' income, raising concerns over the livelihood activities and the food security situation of millions of people dependent on pig farming. Small-scale hog farmers, who rely on the production of pig meat for their own consumption as well as for income generation, are among the most affected as they usually lack the expertise and/or the financial resources necessary to protect their herds from the disease. In the country, about 130 million households are engaged in pig farming and about 30 percent of the national pig output is produced by small-scale producers.

China

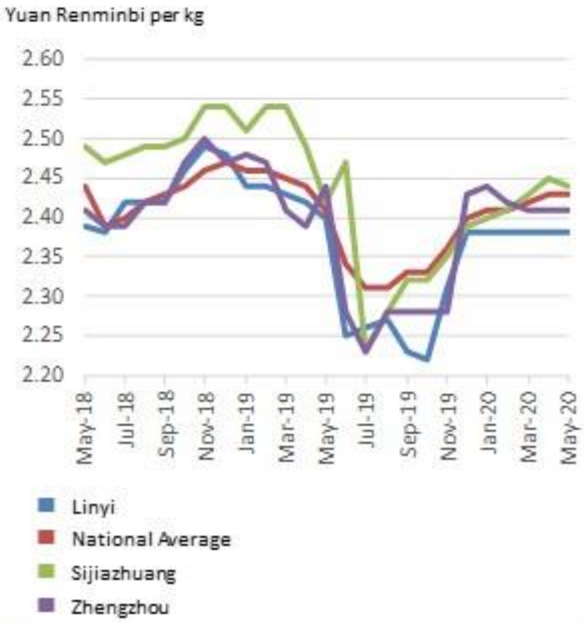
Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

China

Wholesale prices of Wheat



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

COVID-19 and measures adopted by the Government

In an attempt to prevent the spread of the COVID-19 pandemic, the Government adopted several measures, including large-scale mobility restrictions at national level, social distancing and closure of educational institutions. Starting from mid-February 2020, the Government has gradually removed mobility and activity restrictions, prioritizing the essential sectors and industries that are important for the national economy. As of late May 2020, social distancing remains in place in parts of the country, micro-level and international travel remains restricted.

In May 2020, the Government announced the implementation of several packages to support the national economy. These include a CNY 4.2 trillion (USD 594 billion) support package for:

- Epidemic prevention and control, including production of medical equipment.
- Disbursement of unemployed insurance, also to migrant workers.
- Tax relief and waived social security contributions.

The People's Bank of China has been providing monetary support of CNY 1.8 trillion (USD 255 billion) at low interest rates to micro, small and medium enterprises producing essential products and services for the daily necessities and to the agricultural sector.

The Government has also taken measures to provide financial relief to the affected households, businesses and regions facing difficulties to repay loans. The main measures include:

- Encouragement of lending to Small and Medium Enterprises (SMEs), including uncollateralized SME loans from the local banks.
- The delay of loan repayments, with the deadline extended to the end of March 2021, and easing of loan size restrictions for online loans and other credit support measures for eligible SMEs and households.
- The encouragement of lending of higher Non-Performing Loans (NPL) and reduced NPL provision coverage requirements.

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[1] African Swine Fever is highly contagious and lethal disease affecting pigs and wild boars.

Food and Agriculture Organization
of the United Nations

GIEWS Country Brief
China (Mainland)

Reference Date: 12-June-2019

FOOD SECURITY SNAPSHOT

- **Production prospects for 2019 cereal crops are favourable**
- **Concerns about Fall Armyworm infestations progressing towards main maize producing areas**
- **Cereal import requirements in 2018/19 forecast to decrease to below average level**
- **Prices of rice remained stable since beginning of 2019, while prices of wheat have been decreasing**
- **Concerns about outbreaks of African Swine Fever**

Production prospects for 2019 cereal crops are favourable

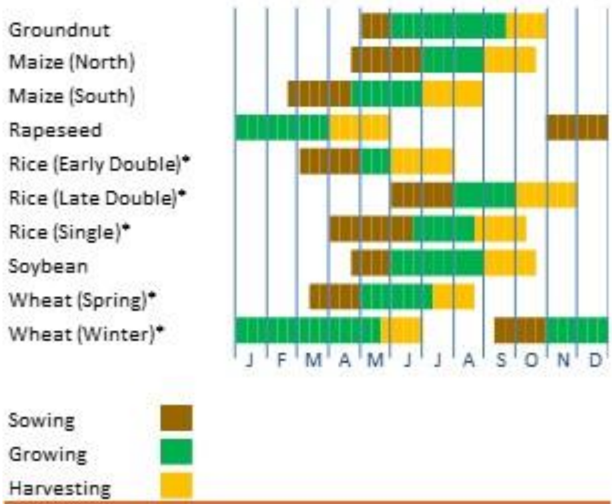
Harvesting of the main winter wheat crop is ongoing and will be completed at the end of June, while harvesting of the spring wheat crop will take place in July and August. Production prospects of both winter and spring wheat crops are favourable. According to remote sensing data, overall vegetation conditions are at normal and above normal levels throughout the main producing provinces (see ASI map). Sufficient snowfall protected the winter crops from low temperatures in most of the country during December and January. Subsequently, well-distributed and normal rainfall between February and May 2019 eased moisture deficits in localized parts of the North China Plain, where the bulk of wheat is produced, supporting crop development and planting activities of the spring crop. Overall, the area planted with wheat in 2019 is estimated at 24.3 million hectares, close to 2018's near-average level, supported by attractive margins earned by wheat producers. The 2019 wheat production is preliminarily forecast at 132 million tonnes, close to last year's near average output.

Harvesting of the 2019 early double rice crop started recently, while planting of single and late double crops, to be harvested between September and November, is still underway. Overall, the planted area with paddy crops in 2019 is expected to be slightly below the average, as farmers might switch to more profitable crops, including soybeans. However, production prospects remain favourable as normal to above normal rainfall has supported planting activities and early crop development in the main producing areas.

Planting of the 2019 maize crop was completed in April in the South and will continue until June in the North, where the bulk of the production is concentrated. The planted area is expected to be near the five-year average, mainly driven by remunerative

China

Crop Calendar *(*major foodcrop)*



Source: FAO/GIEWS.

China

Cereal Production

	2014-2018 average	2018	2019 forecast	change 2019/2018
	000 tonnes			percent
Maize	258 954	257 330	260 000	1.0
Rice (paddy)	211 530	212 130	209 400	-1.3
Wheat	132 099	131 432	132 000	0.4
Others	9 613	9 662	9 728	0.7
Total	612 197	610 554	611 128	0.1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

margins. In the case of the northern Heilongjiang Province, the Government is expected to deliver subsidies to maize growers, encouraging farmers to extend their planting intentions. Overall, production prospects are favourable but some concerns remain for the final maize output due to Fall Armyworm (FAW) infestations spreading northwards from the Yunnan Province, where the pest was first detected in January 2019. As of 29 May, FAW had already spread through 15 southern provinces.

Cereal import requirements in 2018/19 forecast to decrease to below average level

Total cereal import requirements in the 2018/19 marketing year are forecast to decline to 18.3 million tonnes, about 30 percent below the five-year average, reaching the lowest level in six years.

Import requirements of rice in 2019 calendar year are forecast at 4.5 million tonnes, about 22 percent below the previous year's near average level, on account of ample availabilities from the bumper 2018 paddy harvest and large carryover stocks. Similarly, import requirements of wheat in the 2018/19 marketing year (July/June) are forecast at 3.0 million tonnes, 23 percent below the near average level in the previous year, due to ample domestic availabilities from large inventories. Among imports of coarse grains in the 2018/19 marketing year (October/September), imports of maize are forecast at 4 million tonnes, 16 percent above the near average level in the previous year, reflecting strong demand from the feed industry. By contrast, import requirements of barley in 2018/19 are forecast at 6 million tonnes, 30 percent below the five-year average, while imports of sorghum are forecast to come almost to a halt at 500 000 tonnes, accounting for as little as 12 percent of the previous year's near average level. The expected sharp decline of barley and sorghum imports reflects their substitution by maize for feed use.

Prices of rice remained stable since beginning of 2019, while prices of wheat have been decreasing

Prices of "Indica" and "Japonica" rice varieties were generally stable from January to April 2019 due to ample market supplies and, in May 2019, decreased slightly, ahead of the onset of the early rice harvest.

Prices of wheat and wheat flour have been under pressure since November 2018, mainly due to large supplies and favourable expectations of the 2019 wheat harvest.

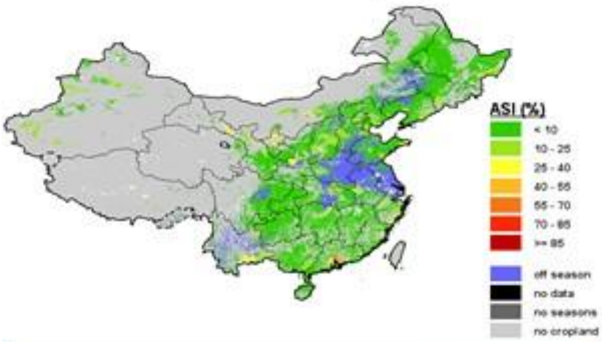
Concerns about outbreaks of African Swine Fever

The country, which is the largest producer and consumer of pork in the world, faces a possible large shortage of supply of its main meat staple. Extensive outbreaks of African Swine Fever (ASF), a highly contagious and lethal disease affecting pigs and wild boars, raise concerns on the food security and livelihoods of the most vulnerable rural households and small farmers.

According to the Ministry of Agriculture and Rural Affairs (MARA), 138 outbreaks of ASF have been detected across the whole country since August 2018. In an effort to contain the further spread of the disease, as of 6 June 2019, MARA has reported that about 1.13 million pigs were culled. Additionally, several

China - Agricultural Stress Index (ASI)

From start of season 1 to Dekad 3, May 2019

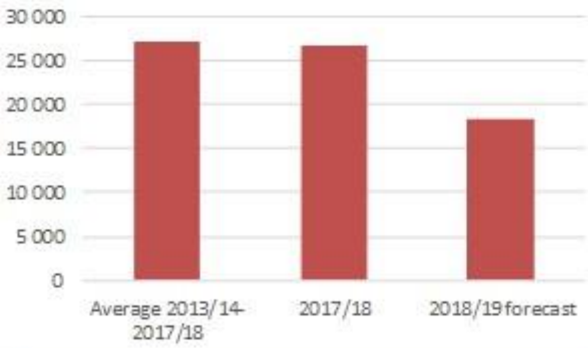


Source: FAO/GIEWS Earth Observation System.

China

Cereals Imports

000 tonnes



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

actions to improve the biosecurity conditions of the pork industry were rolled out, including restrictions of transporting pigs between provinces and stopping the activities of slaughter houses if ASF is detected. As a result, pork meat production has declined since the beginning of the year. However, the release of frozen stocks since mid-March has filled the supply gap and kept prices of pork meat stable.

China

Wholesale prices of Rice (Indica)

Yuan Renminbi per kg

Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

China

Wholesale prices of Wheat

Yuan Renminbi per kg

Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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Food and Agriculture Organization
of the United Nations

GIEWS Country Brief
China (Mainland)

Reference Date: 02-November-2018

FOOD SECURITY SNAPSHOT

- **Planting of 2019 winter wheat started on time in September under mostly favourable weather conditions**
- **Cereal output in 2018 forecast near the five-year average**
- **Cereal import requirements in 2018/19 forecast to decrease below five-year average**
- **Outbreaks of African swine fever in localized areas under control**

Planting of 2019 winter wheat started on time in September under mostly favourable weather conditions

Planting of the 2019 winter wheat crop started on time in mid-September and finalized at the end of October. Overall, weather conditions and precipitation levels have been adequate since early September in most main producing areas, benefitting crop germination and development. However, there are concerns over parts of southern and southeastern provinces of Fujian, Hunan, Jianxi and Zhejiang that registered reduced rainfall levels since the beginning of the season, which have hampered planting activities.

Cereal output in 2018 forecast near five-year average

The 2018 cropping season is near completion and the aggregate cereal production is forecast at 560.5 million tonnes, slightly below the five-year average level.

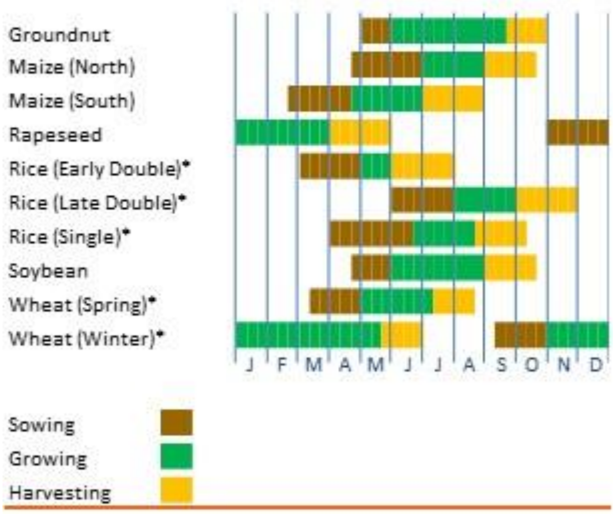
Harvesting of the 2018 paddy crop is underway and is expected to be finalized in November. The 2018 paddy output is forecast at a near-average level of 206.3 million tonnes, slightly below last year's record level, due to a decline in plantings in response to lower minimum Government procurement prices and governmental efforts to replace paddy cultivation with more profitable crops.

Harvesting of the 2018 maize crop finalized in October and total output is estimated at an average level of 216.5 million tonnes. Higher average yields contained a slight reduction in plantings and some crop losses caused by drought conditions in northeastern provinces of Liaoning and Jilin.

The harvest of the 2018 wheat crop finalized in August and

China

Crop Calendar (*major foodcrop)



Source: FAO/GIEWS.

China

Cereal Production

	2013-2017 average	2017	2018 forecast	change 2018/2017
	000 tonnes			percent
Maize	218 836	215 891	216 500	0.3
Rice (paddy)	206 796	208 560	206 300	-1.1
Wheat	128 033	133 000	128 000	-3.8
Others	9 542	10 006	9 662	-3.4
Total	563 207	567 457	560 462	-1.2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

production is estimated at an near-average level of 128 million tonnes.

Cereal import requirements in 2018/19 forecast to decrease below five-year average

Total cereal import requirements in the 2018/19 marketing year are forecast at 25.4 million tonnes, 6 percent below the five-year average.

Rice import requirements are forecast at a below-average level of 5.2 million tonnes, reflecting ample domestic availabilities and more competitive domestic quotations. By contrast, maize import requirements are forecast well above the five-year average, at 4 million tonnes, responding to reduced inventories and the growing demand for industrial and feed use. Similarly, wheat import requirements are forecast above the five-year average, at 4 million tonnes, driven by stronger demand for high-quality wheat.

Outbreaks of African swine fever in localized areas under control

According to official reports, outbreaks of the highly contagious and lethal viral African swine fever have been registered since August this year in the Liaoning, Henan, Jiansu, Anhui and Zhenjiang provinces. As of 17 October, about 50 000 pigs had been culled and local authorities have rolled out emergency response actions that successfully controlled the spread of the disease.

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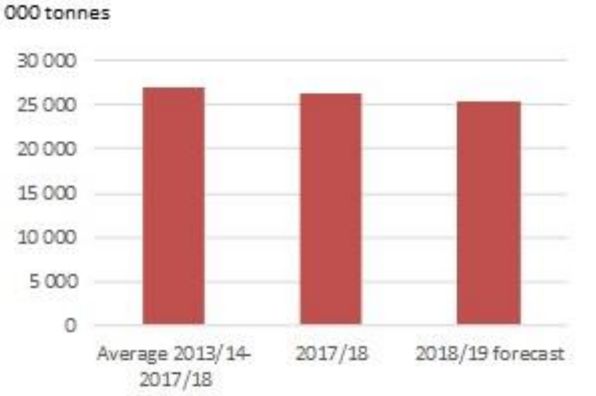
China

Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

Food and Agriculture Organization of the United Nations

GIEWS Country Brief
China (Mainland)

Reference Date: 09-January-2018

FOOD SECURITY SNAPSHOT

- **Favourable weather conditions benefitted planting of 2018 winter wheat crop**
- **Above-average cereal production obtained in 2017**
- **Cereal imports in 2017/18 forecast close to average**
- **Prices of rice and wheat stable in recent months**

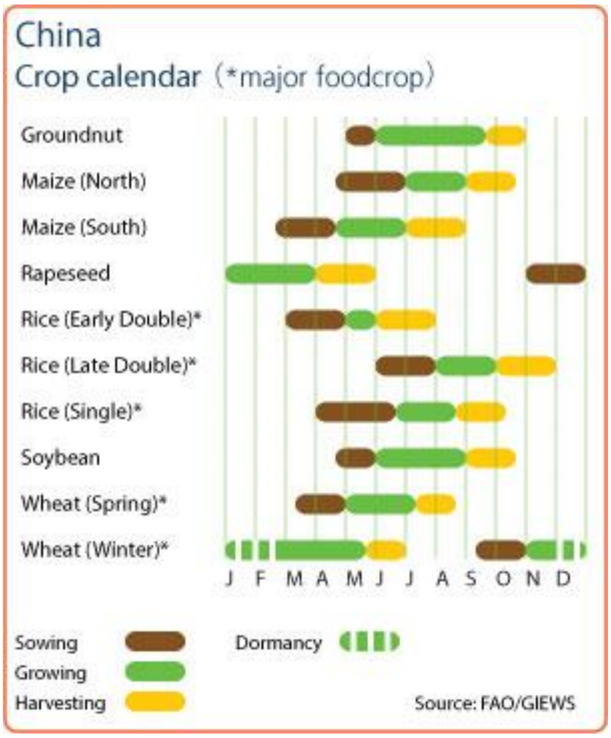
Wheat area in 2018 estimated close to last year's average level

Sowing of the 2018 winter wheat crop, which accounts for about 95 percent of the total wheat production, was completed in October and harvest is expected to start in May. During sowing, weather conditions have been generally favourable in the main producing areas located in the eastern and central parts of the country, allowing timely land preparation and planting. However, some areas of the important wheat producing provinces of Anhui, Henan, Hubei and Jiangsu, located in the eastern parts of the country, experienced slightly below-average rains since the start of the season. Overall, as of late December 2017, local reports indicated that wheat crop conditions and soil moisture were generally near normal over most of the country. The total area planted to wheat in 2018 is estimated to remain close to last year's average level, reflecting the still attractive margins earned by wheat producers despite a 2.5 percent reduction in the minimum state purchase price for the 2018 wheat crop.

Above-average cereal production in 2017

The 2017 aggregate cereal production is estimated at 564.3 million tonnes, close to the previous year's above-average level.

Disaggregated by crops, maize output in 2017 is officially estimated at 215.9 million tonnes, showing a slight decrease for the second consecutive year, but it still remained close to the average levels. Recent decreases in maize output are mainly driven by area the contractions as farmers prefer to plant more profitable crops, in particular soybeans, in response to the Government's decision to lower the maize procurement price. The 2017 rice output is officially estimated at 208.6 million tonnes, 1.5 million tonnes above last year's good level and close to the 2015 record. Similarly, wheat production in 2017 is estimated at a near-record level of 129.8 million tonnes, mostly reflecting record yields supported by favourable weather conditions.



China

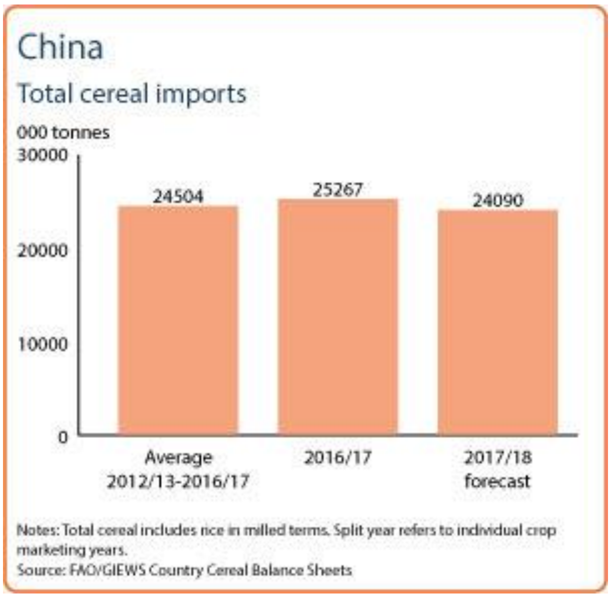
Cereal production

	2012-2016 average	2016	2017 estimate	change 2017/2016
	000 tonnes			percent
Maize	216 781	219 554	215 891	-2
Rice (paddy)	205 931	207 075	208 560	1
Wheat	125 601	128 845	129 774	1
Others	9 410	9 636	10 082	5
Total	557 724	565 110	564 307	0

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

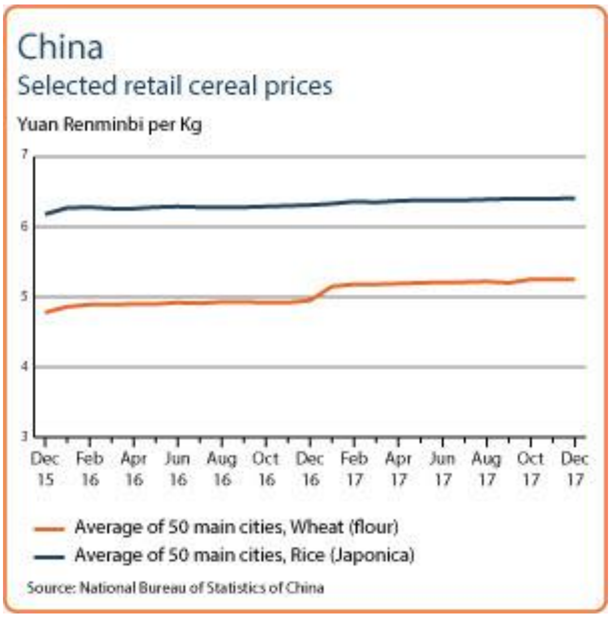
Cereal imports in 2017/18 forecast close to five-year average

Total cereal imports in the 2017/18 marketing year are currently forecast at 24.1 million tonnes, a third decline since the record level reached in 2014/15, but remain close to the five-year average. Imports of wheat are forecast at 3.5 million tonnes, a decline of almost 20 percent from last year's high level, due to high stock quantities obtained from successive bumper harvests. Imports for feed cereals are forecast to return to average, after the exceptional high levels between 2014/15 and 2015/16, due to expectations of the much larger use of domestic maize for feed and industrial processing in view of the Government's plan to cut domestic inventories. Rice imports are expected to remain close to the five-year average level at 5.8 million tonnes, given persistently more profitable prices in other major origins in Asia compared with local quotations.



Prices of rice and wheat stable in recent months

Retail prices of Japonica rice and wheat flour, the major food crops, were generally stable in the previous months reflecting abundant market supplies from the bumper outputs in 2017.



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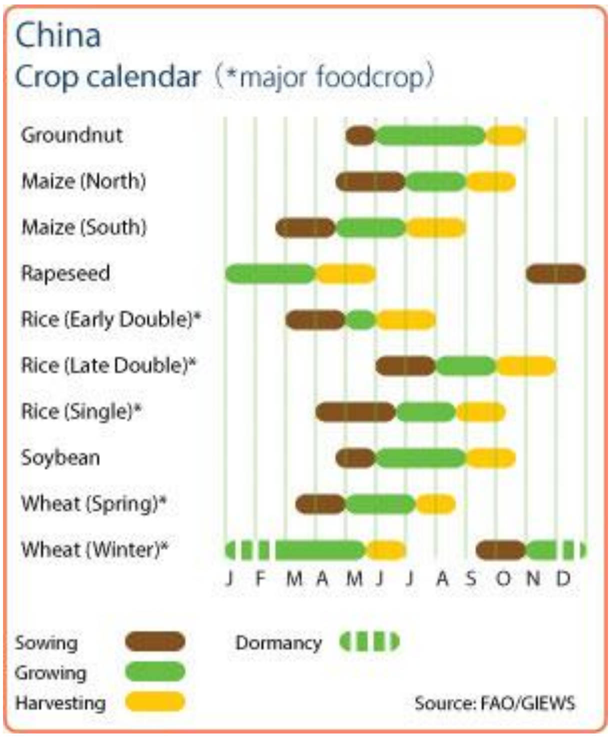
Food and Agriculture Organization of the United Nations

GIEWS Country Brief
China (Mainland)

Reference Date: 11-April-2017

FOOD SECURITY SNAPSHOT

- **Overall 2017 winter wheat crop conditions mostly favourable**
- **Maize area and production expected to decline in 2017**
- **Cereal production in 2016 decreased marginally**
- **Cereal imports in 2016/17 forecast to sharply decline from previous year in response to policy changes**
- **Prices of rice and wheat stable in recent months**



Winter wheat conditions in 2017 mostly favourable with exception of southwest region

Planting of the winter wheat crop was completed in October 2016 and the harvest is expected to start from May 2017. This crop accounts for about 95 percent of the total wheat production. Winter wheat is currently at re-greening to jointing stage in the major producing regions. Crop conditions are favourable in major producing areas of Northern China due to proper agro-climatic conditions, while excessive rains and low radiation have negatively affected crops in Southwest China.

Aggregate cereal production in 2017 is tentatively set at 563.5 million tonnes, slightly below last-year level. Maize production is expected to decline as a consequence of the policy reform of supply structure in 2017.

Under the new supply structural reform, the Government's support to rice and wheat production will continue in 2017. On 18 February, the Government announced the minimum purchase prices for rice in 2017 as follows: for early Indica rice at CNY 2 600 (USD 378), medium and late Indica at CNY 2 720 (USD 396) and Japonica rice at CNY 3 000 (USD 437). The minimum purchase price for winter wheat was set at CHY 2 360 (USD 344), announced on 21 October 2016.

China

Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Maize	216 787	219 554	216 000	-2
Rice (paddy)	205 903	206 934	208 400	1
Wheat	125 603	128 850	128 800	0
Others	9 626	10 716	10 332	-4
Total	557 919	566 054	563 532	0

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Cereal production in 2016 estimated to decrease marginally

The 2016 aggregate cereal production is estimated at about 566 million tonnes, down 2 percent compared to 2015. The latest official estimate for the 2016 paddy output, harvested by last November, points at 206.9 million tonnes, slightly below the previous year's record level. The small contraction mirrors reduced yields, following unfavourable weather conditions during the growing season. Similarly, the 2016 wheat production is estimated at 128.6 million tonnes, 1.6 million tonnes below the previous year's level. Despite the impact on production by the Government's decision to end maize procurement at high minimum support prices, the 2016 maize output is set at 219.6 million tonnes, some 5 million tonnes below the previous year's record, but still higher than the five-year average.

Cereal imports in 2016/17 forecast sharply down from 2015/16 record level

Total cereal imports in the 2016/17 marketing year (July/June) are currently foreseen to fall by 32 percent to 21.3 million tonnes compared to the exceptionally high level of the previous year. The bulk of the decline is on account of falling purchases of barley and sorghum from the international market due to expectations of the much larger use of domestic maize for feed in view of the Government's plan to cut its inventories. Consequently, imports of barley and sorghum, the main grains used for feed, are forecast to fall by 43 percent to 4.6 million tonnes and 46 percent to 4.5 million tonnes, respectively, in the 2016/17 marketing year. Similarly, imports of maize are currently foreseen to decrease by almost 68 percent to 1 million tonnes. Strong domestic demand for premium quality wheat is seen to keep wheat imports high at 3.7 million tonnes during the 2016/17 marketing year (June/May). Rice imports in calendar year 2017 are forecast at over 6 million tonnes, similar to last year's high level, as a result of the Government's efforts to limit informal inflows of rice across borders.

Prices of rice and wheat stable in recent months

Retail prices of Japonica rice and wheat flour, major food crops, were generally stable with a slight increase only in recent months, reflecting adequate availabilities and seasonality. Overall, quotations were about 5 percent above their year-earlier levels. Wholesale prices of maize, the major feed crop, were lower (6.7 percent) compared with the same period of the previous year as a result of the change of the Government's maize production policy. The data shows that the price of pork in March was about 7 percent lower and the price of cabbage was about 46 percent lower compared to a year earlier. These will be beneficial to the food consumption of the poor and low income families.

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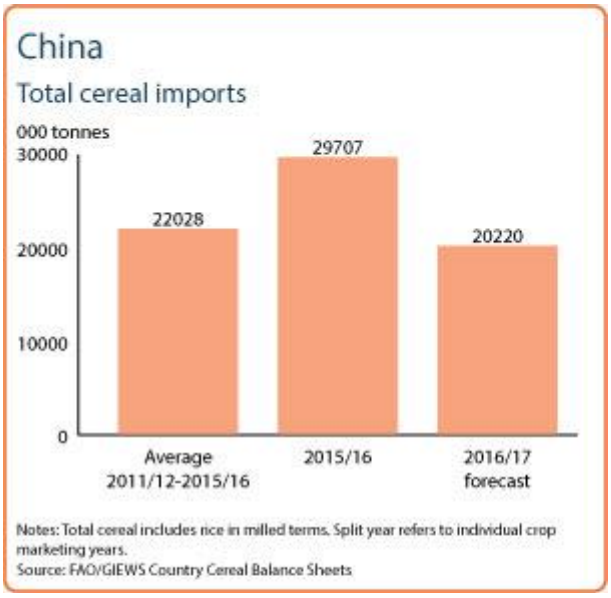
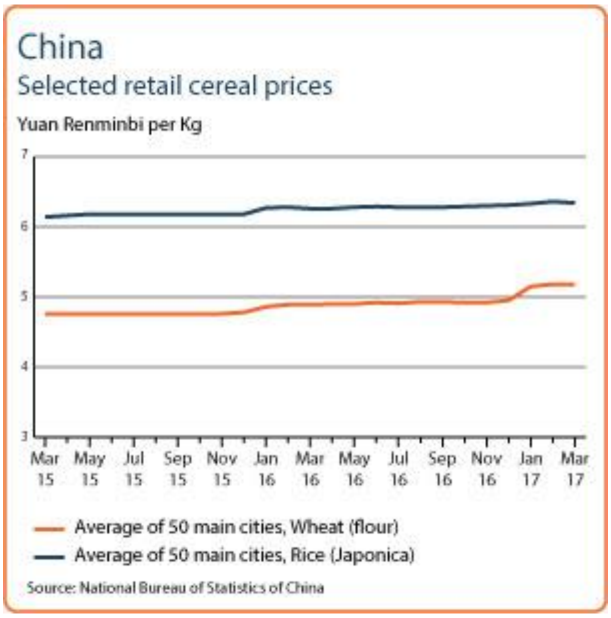




Food and Agriculture Organization of the United Nations

GIEWS Country Brief
China (Mainland)

Reference Date: 22-December-2016

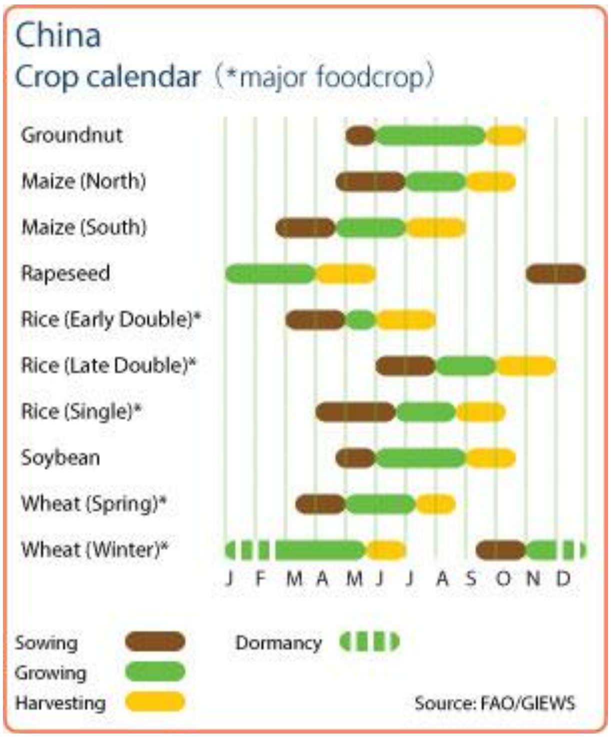
FOOD SECURITY SNAPSHOT
- **Winter wheat plantings in 2017 increased slightly compared to last year's level**
- **Cereal production in 2016 forecast to decrease marginally**
- **Cereal imports in 2016/17 forecast sharply down from 2015/16 record level**
- **Prices of rice and wheat stable in recent month**

Winter wheat plantings in 2017 increased slightly compared to last year's level

Planting of the winter wheat crop, for harvest from May 2017, concluded in October. This crop accounts for about 95 percent of the total wheat production. Weather conditions in September and October were favourable in the main producing areas, including the North China Plain and Yangtze Valley, facilitating planting activities. According to official estimates, 22.8 million hectares were sown to winter wheat, slightly above last year's high level, mainly as a response to the continued strong production incentives from the State's minimum purchases price programme. However, excessive rains in November raise concerns for the dormant wheat crop in parts of central and southern main growing areas, including the provinces of Jiangsu, Anhui and Henan, which together account for almost half of national wheat output. Nonetheless, prospects remain positive at this stage, as the season has just begun and will very much depend on weather conditions in the coming months.

Cereal production in 2016 forecast to decrease marginally

The 2016 aggregate cereal production is estimated at 560.8 million tonnes, down 2 percent year-on-year. The latest official forecast for the 2016 paddy output, harvested by November, has been revised downwards to 206.9 million tonnes, slightly below last year's record level. The contraction mirrors reduced yields, following heavy seasonal rains, coupled with storms, as well as low sunshine conditions (for more information please see Rice Market Monitor). Similarly, excessive rains and consequent pest outbreaks negatively affected the winter wheat crop just before its harvest in localized central areas of the eastern provinces of the country. As a result, official forecasts put the 2016 wheat production at 128.6 million tonnes, 1.6 million tonnes below last year's level. Regarding the 2016 maize crop production, the Government's decision to end maize procurement



China
Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Maize	211 422	224 580	215 000	-4
Rice (paddy)	204 721	208 251	206 934	-1
Wheat	123 313	130 187	128 580	-1
Others	9 280	9 902	10 267	4
Total	548 736	572 920	560 781	-2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

at high minimum support prices this year prompted farmers to shift land from maize to more profitable crops, including soybean, rice and peanuts. As a result, the 2016 maize output is set to decrease by 2 percent or 9.6 million tonnes, to 215 million tonnes.

Cereal imports in 2016/17 forecast sharply down from 2015/16 record level

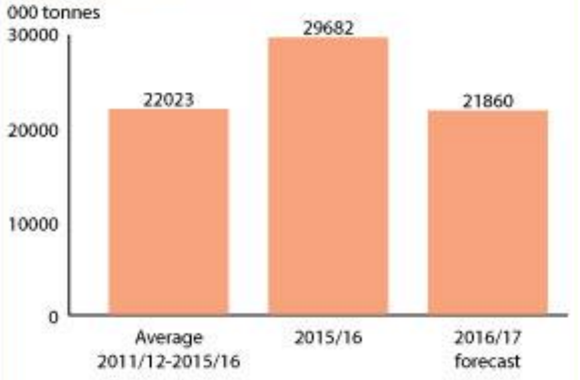
Total cereal imports in the 2016/17 marketing year are currently foreseen to fall by 26 percent to 21.9 million tonnes compared to the exceptionally high level of the previous year, mostly as a result of the good 2015 harvests and large inventories. The bulk of the decline is on account of falling purchases of barley and sorghum from the international market due to expectations of the much larger use of domestic maize for feed in view of the Government's plan to cut its inventories. Consequently, imports of barley and sorghum, which are two of the main grains used for feed, are forecast to fall by 43 percent to 4.6 million tonnes and 40 percent to 5 million tonnes, respectively, in the 2016/17 marketing year. Similarly, imports of maize are currently foreseen to decrease by almost 40 percent to 2 million tonnes. Strong domestic demand for premium quality wheat is seen to keep wheat imports high at 3.7 million tonnes during the 2016/17 marketing year (June/May). Rice imports in calendar year 2016 are forecast at 5.9 million tonnes, 11 percent below last year's high level, as a result of the Government's efforts to limit informal inflows of rice across borders.

Prices of rice and wheat stable in recent month

Retail prices of Japonica rice and wheat flour were stable in recent month, reflecting adequate availabilities from the 2016 good production. Overall, quotations were around their year-earlier levels.

China

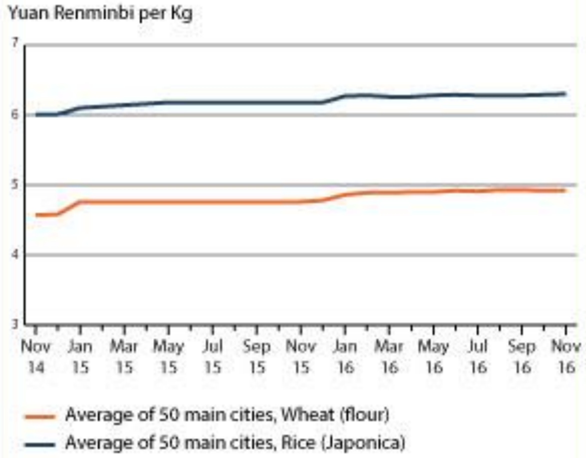
Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

China

Selected retail cereal prices



Source: National Bureau of Statistics of China

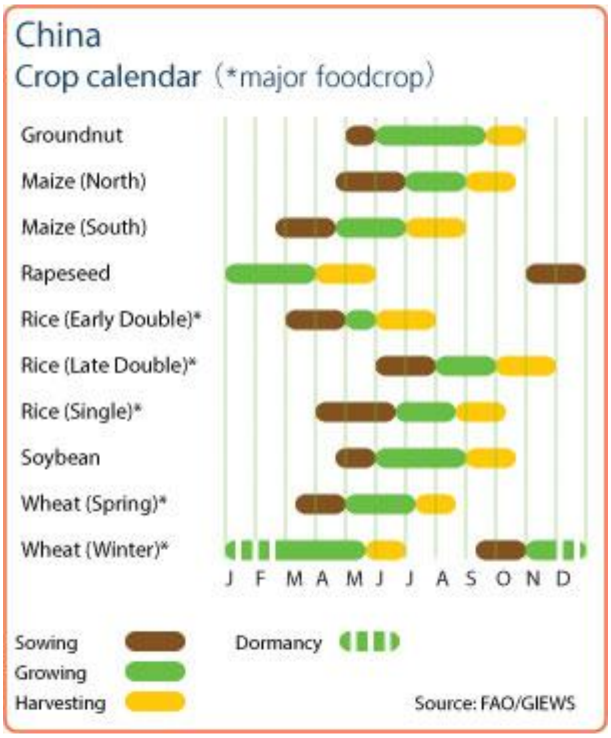
Food and Agriculture Organization of the United Nations

GIEWS Country Brief
China (Mainland)

Reference Date: 25-August-2016

FOOD SECURITY SNAPSHOT

- **Floods have negatively affected localized areas of central and southern parts, but overall impact on 2016 cereal crops expected to be limited**
- **Cereal production in 2016 forecast to decrease marginally**
- **Cereal imports in 2016/17 forecast sharply down from 2015/16 record level**
- **Prices of rice and wheat were stable in July**



China

Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Maize	211 422	224 580	219 000	-2
Rice (paddy)	204 721	208 251	209 100	0
Wheat	123 313	130 187	128 580	-1
Others	9 280	9 902	10 036	1
Total	548 736	572 920	566 716	-1

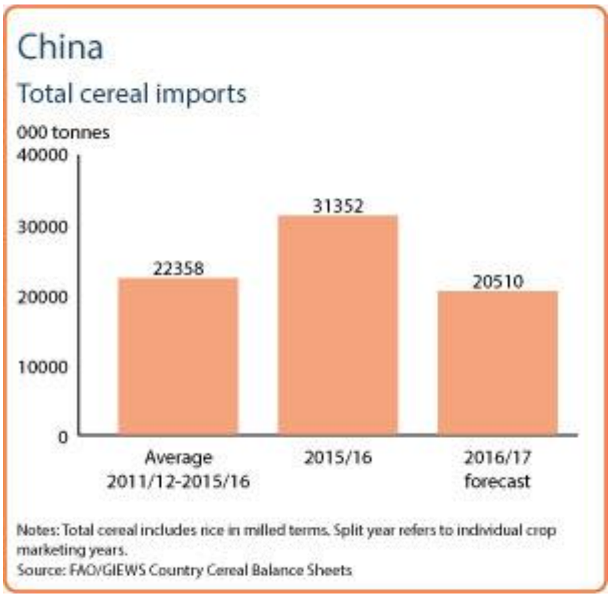
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Cereal production in 2016 forecast to decrease marginally

Heavy seasonal rains, coupled with storms and typhoons since mid-June, triggered severe localized flooding in central and southern parts of the country, causing severe damage to housing, infrastructure and the agricultural sector. According to official data, in July, at least 612 people lost their lives, 1.87 million houses were damaged or destroyed (the highest number since 2011) and 7.3 million hectares of farmland negatively affected. At the time of the floods, harvesting of the 2016 winter wheat crop, which accounts for 95 percent of the annual production, was nearing completion in the central and eastern parts of the country, while the spring wheat, normally grown in the northern areas, was being planted. Excessive rains and consequent pest outbreaks negatively affected the ready-to-be harvested winter wheat crop in localized central areas of the eastern provinces of the country and may have reduced the yield potential of the early-planted spring crop. As a result, the China National Grains and Oils Information Centre (CNGOIC) forecasts the 2016 wheat production at 128.6 million tonnes, 1.6 million tonnes below last year's level but still the second best on record. As to the 2016 paddy crop, it is still officially expected to reach record levels of 209.1 million tonnes, as flood-induced losses are expected to be more than offset by an increased output in non-flood affected areas, namely the northeastern provinces. The 2016 maize output is forecast by CNGOIC at 219 million tonnes, 2 percent or 6 million tonnes below the 2015 level. This anticipated reduction is attributed to area cuts, as farmers shift land from maize to more profitable crop, including soybean, rice and peanuts, following the Government decision to end maize procurement at high minimum support prices this year.

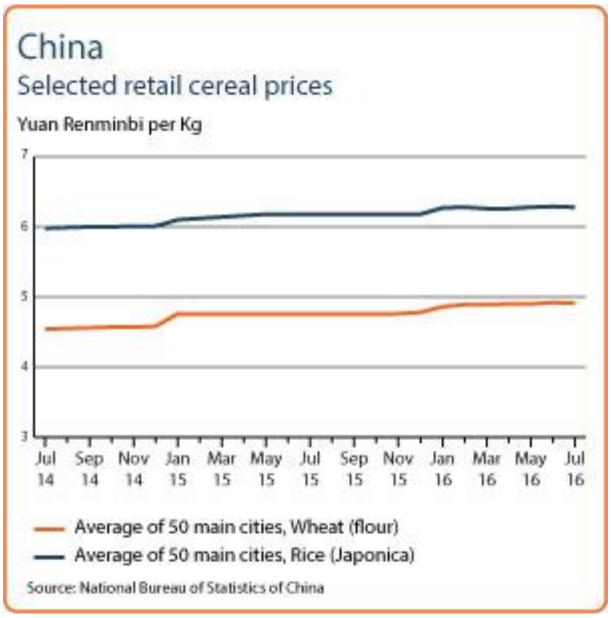
Cereal imports in 2016/17 forecast sharply down from 2015/16 record level

Total cereal imports in the 2016/17 marketing year are currently foreseen to fall by 35 percent to 20.5 million tonnes compared to the exceptionally high level of the previous year, mostly as a result of the bumper 2015 harvests and large stocks. The bulk of the decrease mainly reflects anticipated reduced imports for feed cereals. Barley and sorghum imports in the 2016/17 marketing year are forecast to fall by 50 percent and 41 percent, to 4 million tonnes and 5 million tonnes, respectively. Similarly, imports of maize are currently foreseen to decrease by more than half to 2 million tonnes. Strong domestic demand for premium quality wheat is seen to keep wheat imports high at 3 million tonnes during the 2016/17 marketing year (June/May). Rice imports in calendar year 2016 are anticipated to decrease by 5 percent to 6.3 million tonnes, as a result of Government efforts to limit informal inflows.



Prices of rice and wheat were stable in July

Retail prices of Japonica rice and wheat flour were stable in July, reflecting adequate availabilities from the 2015 record production. Overall, quotations were around their year-earlier levels.



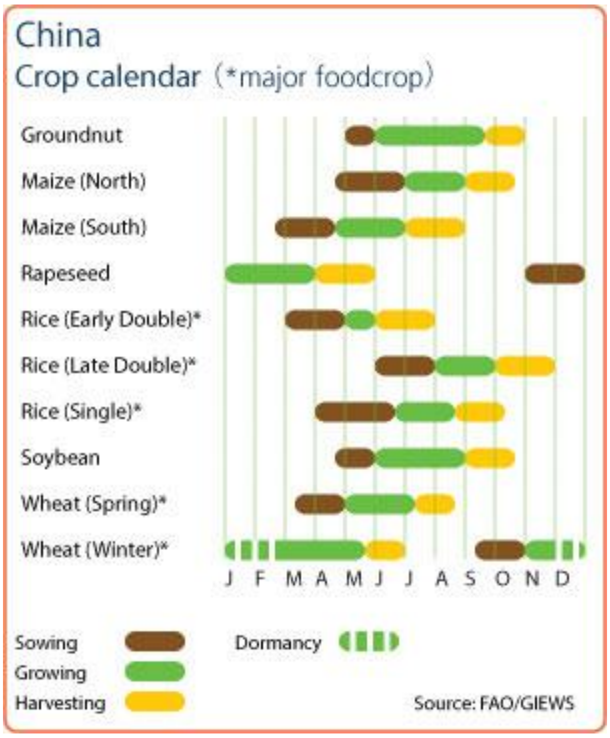
GIEWS Country Brief

China (Mainland)

Reference Date: 22-March-2016

HIGHLIGHTS

- **Prospects for 2016 winter wheat crop are favourable**
- **Cereal output in 2015 reached a record level**
- **Aggregate cereal imports in 2015/16 forecast to decrease from last year's all-time high**
- **Prices of rice and wheat were stable in February**



Prospects for 2016 winter wheat crop are favourable

The 2016 winter wheat crop, which accounts for about 95 percent of China's total wheat production, is currently in the early development stages and harvesting will start in late May. Beneficial precipitation since November, coupled with seasonably cool weather, aided vegetative development of the crops over large parts of the country, including in the main producing areas of Yangtze River Valley and North China Plain. The China National Grain and Oils Information Centre estimates the area planted to winter wheat for harvest in 2016 at 22.8 million hectares, unchanged from last year's record level, largely reflecting strong Government incentives for wheat production. Current expectations point to an aggregate wheat output (winter and spring crops) close to the 2015 record level of 130 million tonnes.

Cereal output in 2015 at an all-time high

The 2015 aggregate cereal production is officially estimated at a record level of 572.9 million tonnes. Most of the increase came from a significant growth in maize output, although production of the other major cereals, wheat and rice, also rose. Maize output is estimated to have reached a record of 224.6 million tonnes, 9 million tonnes (or 4 percent) up on the previous year, following larger plantings and yields. Similarly, area and yield gains resulted in a 3 percent increase in the 2015 wheat output to 130.2 million tonnes. The 2015 rice harvest was estimated at 208.2 million tonnes, 0.8 percent above the previous year's record.

China

Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes			percent
Rice (paddy)	202 223	206 507	208 250	1
Maize	201 955	215 646	224 580	4
Wheat	120 312	126 208	130 187	3
Others	9 157	9 524	9 901	4
Total	533 647	557 885	572 918	3

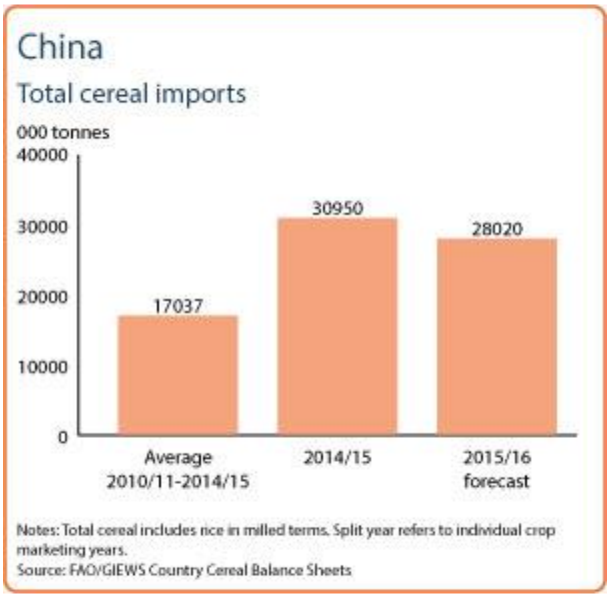
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

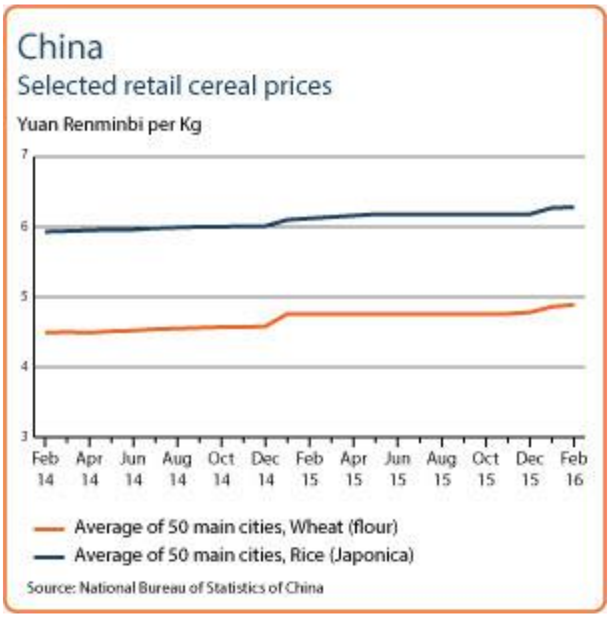
Cereal imports in 2015/16 marketing year forecast to remain high but lower than in 2014/15

Total cereal imports in the 2015/16 marketing year are currently foreseen to fall by 9 percent to 28 million tonnes compared to the exceptionally high level of the previous year, mostly as a result of the bumper 2015 harvests and large stocks. The bulk of the decrease is attributed to an anticipated reduction in maize and sorghum imports, which are forecast to fall by 46 percent and 31 percent, to 3 million tonnes and 7 million tonnes, respectively. By contrast, imports of barley are expected to continue to expand to a record of 8.5 million tonnes. Strong domestic demand for premium quality wheat is seen to double imports of wheat to 3 million tonnes during the 2015/16 marketing year (June/May). Rice imports in calendar year 2016 are anticipated to decrease by 6 percent to 5.8 million tonnes, as a result of Government efforts to limit informal inflows.

Prices of rice and wheat were stable in February

Retail prices of Japonica rice and wheat flour were stable in February, reflecting adequate availabilities from the 2015 record production. Overall, quotations were around their year-earlier levels.


China
Total cereal imports
000 tonnes
40000
30000
20000
10000
0
17037
30950
28020
Average 2010/11-2014/15
2014/15
2015/16 forecast
Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets


China
Selected retail cereal prices
Yuan Renminbi per Kg
Feb 14
Apr 14
Jun 14
Aug 14
Oct 14
Dec 14
Feb 15
Apr 15
Jun 15
Aug 15
Oct 15
Dec 15
Feb 16
Average of 50 main cities, Wheat (flour)
Average of 50 main cities, Rice (Japonica)
Source: National Bureau of Statistics of China

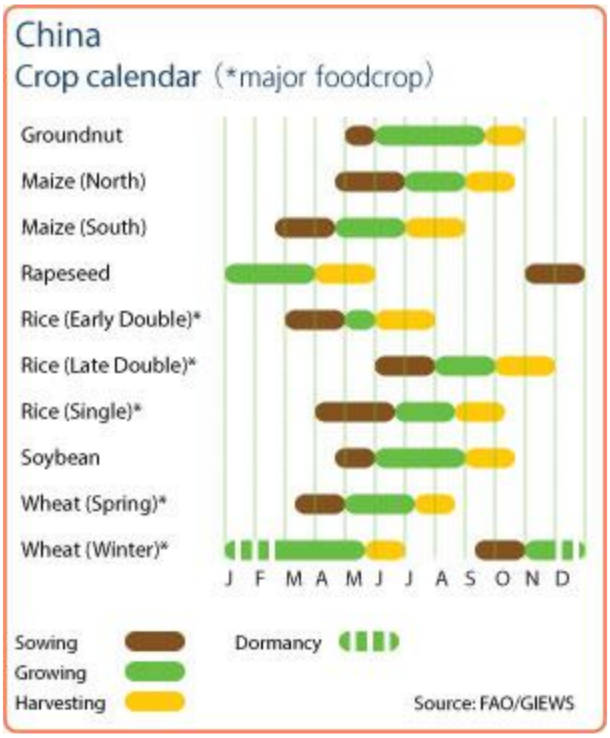
GIEWS Country Brief

China (Mainland)

Reference Date: 16-February-2016

HIGHLIGHTS

- **Winter wheat area, for harvest in 2016, unchanged from last year's record level**
- **Cereal output in 2015 was record level**
- **Aggregate cereal imports in 2015/16 forecast to decrease from last year's all-time high**
- **Prices of rice and wheat increase slightly in January**



Winter wheat area, for harvest in 2016, unchanged from last year's record level

Sowing of the 2016 winter wheat crop, which accounts for about 95 percent of the total wheat production, was completed last October under overall favourable weather conditions. Beneficial precipitation since November, coupled with seasonably cool weather aided vegetative development of the crops over large parts of the country, including in main producing areas of Yangtze River Valley and North China Plain. However, some concerns over localized crop damage exist in eastern and southern producing areas, due to unseasonal abundant rains, as well as in the parts of Lower and Middle Yangtze following historically cold temperatures in early February. The China National Grain and Oils Information Centre estimates the area planted to winter wheat for harvest in 2016 at 22.8 million hectares, unchanged from last year's record level, largely reflecting strong Government incentives for wheat production. Current expectations point to an aggregate wheat output (winter and spring crops) close to the 2015 record level of 130 million tonnes. This forecast assumes favourable weather from late February, when winter wheat is expected to break dormancy and resume growth.

China

Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes			percent
Rice (paddy)	202,223	206,507	208,250	1
Maize	201,955	215,646	224,580	4
Wheat	120,312	126,208	130,187	3
Others	9,157	9,524	9,901	4
Total	533,647	557,885	572,918	3

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Cereal output in 2015 was record level

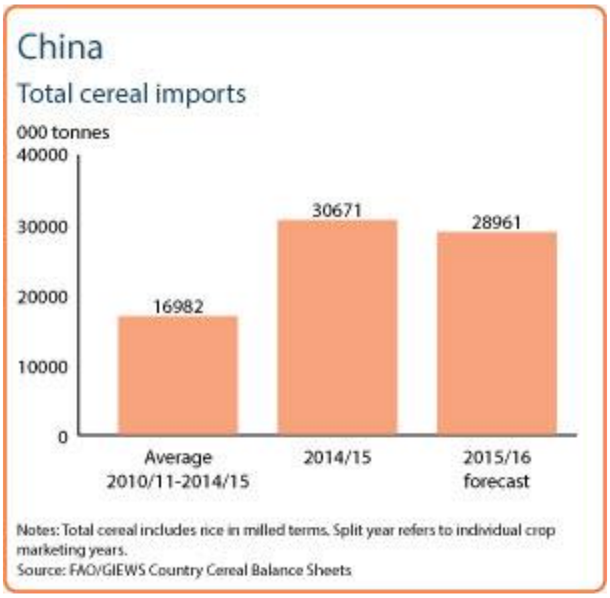
The 2015 aggregate cereal production is officially estimated at a record level of 572.9 million tonnes. Most of the increase came from a significant growth in maize output, although production of the other major cereals, wheat and rice, also rose. Maize output is estimated to have risen to a record level of 224.6 million tonnes, 9 million tonnes (or 4 percent) up on the previous year's level, following larger plantings and increased yields. Similarly, area and yield gains resulted in a 3 percent increase in the 2015 wheat output to 130.2 million tonnes. The 2015 rice harvest also reached a new record level, estimated at 208.2 million tonnes, 0.8 percent above the previous year's record level.

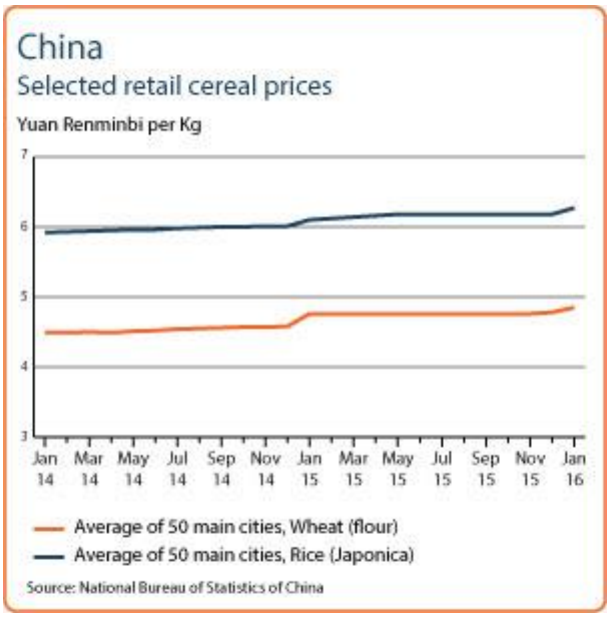
Cereal imports in 2015/16 marketing year forecast to remain high but lower than in 2014/15

Total cereal imports in the 2015/16 marketing year are currently foreseen to fall by 6 percent to 29 million tonnes compared with the exceptionally high level of last year mostly as a result of record 2015 harvests and large stocks. The bulk of the decrease is attributed to an anticipated reduction in maize and sorghum imports, which are both forecast to fall by around 30 percent, to 4 million tonnes and 7 million tonnes, respectively. By contrast, imports of barley are expected to continue to expand to a record of 8.5 million tonnes. Strong domestic demand for premium quality wheat is seen to double imports of wheat to 3 million tonnes during the 2015/16 marketing year (June/May). Rice imports in calendar year 2016 are anticipated to decrease by 6 percent to 5.8 million tonnes, as a result of Government efforts to limit informal imports.

Prices of rice and wheat increased slightly

Retail prices of Japonica rice and wheat flour increased only slightly in January, mainly reflecting sustained domestic demand, but were still around their year-earlier levels.





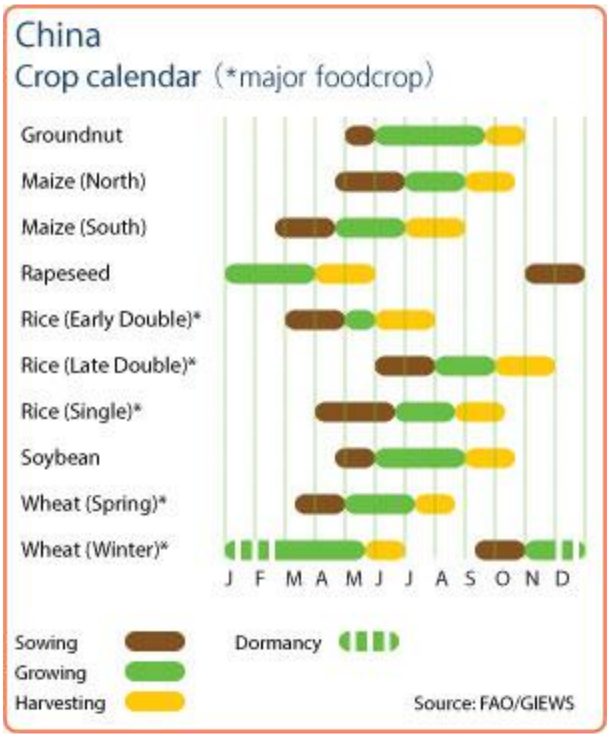
GIEWS Country Brief

China (Mainland)

Reference Date: 17-April-2015

FOOD SECURITY SNAPSHOT

- **Wheat production in 2015 is forecast to remain around last year's record level**
- **Aggregate cereal imports in 2014/15 forecast to reach an all-time high**
- **Prices of rice and wheat remain stable**



China

Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Rice (paddy)	202 207	206 427	207 000	0
Maize	201 960	215 673	217 000	1
Wheat	120 304	126 171	126 500	0
Others	9 059	9 032	9 060	0
Total	533 531	557 303	559 560	0

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Wheat production in 2015 is forecast to remain around last year's record level

The 2015 winter wheat crop, which accounts for about 95 percent of the total wheat production, is currently in the final stages of development, with harvesting operations to start from mid-May. Following below-average precipitation in southern parts of Yangtze Valley in the first part of the season, rains improved across most of the country since mid-March, benefitting crop development after it came out of dormancy in mid-February. The vegetation response captured by the Normalized Difference Vegetation Index (NDVI), as of the first dekad of April, shows overall good growing conditions of winter wheat over most of the country. Nationally, the total area planted to wheat is officially estimated at 24.2 million tonnes, up 1 percent from last year's high level. Considering the small expansion in area planted and assuming favourable weather in the remaining of the growing season, FAO's preliminarily forecasts the 2015 wheat output to expand marginally to a record level of 126.5 million tonnes.

Planting of the 2015 minor early rice crop, which is normally grown in the southern parts of the country and accounts for about 16 percent of the total rice production, is nearing completion. Rainfall across southern China has been average to above average since the start of the season in March, benefitting planting operations and early crop development. As a result, FAO projects this season's rice output at 34.1 million tonnes, close to last year's record level. Assuming a normal upcoming monsoon season and considering a small increase in plantings, the aggregate 2015 rice production is forecast by FAO at 207 million tonnes, marginally above last year's record level.

Planting of the 2015 maize crop started in the south and will be concluded by July in the north. FAO's preliminarily forecasts set the 2015 aggregate maize production at 217 million tonnes, slightly above last year' record output. The expected increase is mainly attributed to a 2 percent expansion in the area planted, in response to rising demand for feed grains.

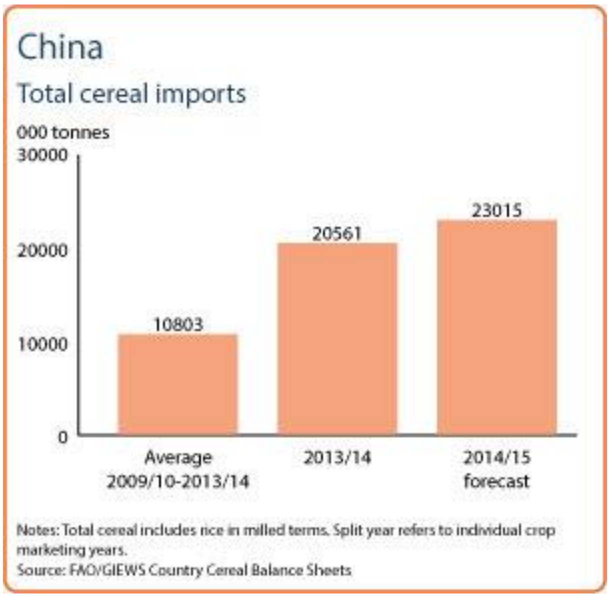
Cereal imports in 2014/15 marketing year forecast to reach an all-time high

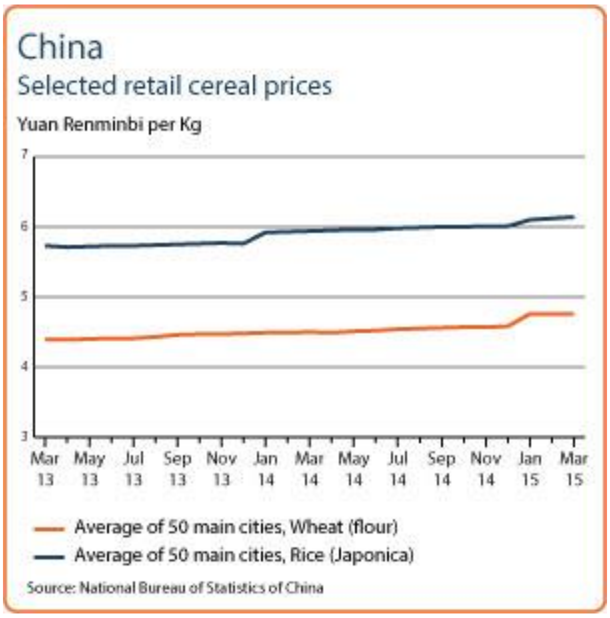
Total cereal imports in the 2014/15 marketing year are forecast to reach an all-time high of 23 million tonnes, some 12 percent above the estimated imports in 2013/14. The increase is mainly attributed to considerably higher barley and sorghum imports, which are projected at a record level of 7 and 8 million tonnes in 2014/15 marketing year, almost double the level of the previous year. With higher demand from the feed industries, private buyers are increasingly importing sorghum and barley as complement to maize. Unlike maize, sorghum and barley are not subject to the annual Tariff Rate Quota (TRQ) restrictions and import prices of these crops are considerably lower than the price of locally-produced maize. Maize imports are also projected to increase considerably to 4 million tonnes. By contrast, total wheat imports are set to decrease by 5.5 million tonnes for the 2014/15 marketing year (July/June), as a result to last year's bumper harvest and large carryover stocks.

Rice imports during 2015 are forecast to remain similar to last year's above-average level of 2.7 million tonnes.

Prices of rice and wheat remain stable

Retail prices of Japonica rice and wheat flour remained generally stable in March, despite good supplies from the 2014 bumper harvests. Prices were mainly supported by the high level of the Minimum Support Prices (MSP) and strong domestic demand.





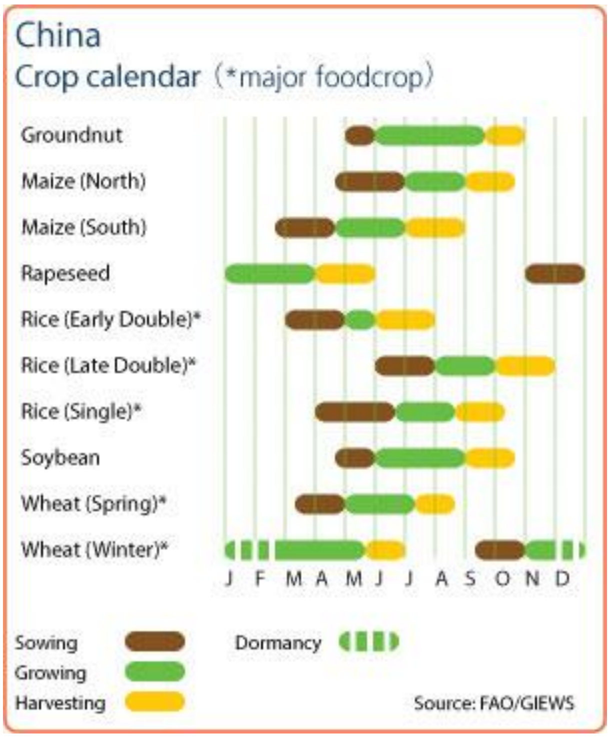
GIEWS Country Brief

China (Mainland)

Reference Date: 17-December-2014

FOOD SECURITY SNAPSHOT

- **2014/15 winter wheat plantings estimated to remain close to last year's level**
- **Record 2014 aggregate cereal harvest estimated**
- **Aggregate cereal imports in 2014/15 forecast to decrease from last year's record level**
- **Prices of rice and wheat remain stable**



China

Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes			percent
Rice (paddy)	199 943	203 612	205 010	1
Maize	191 621	218 489	215 673	-1
Wheat	118 093	121 926	126 171	3
Others	9 004	9 412	9 032	-4
Total	518 661	553 439	555 886	0

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

2014/15 winter wheat plantings estimated to remain close to last year's level

Planting of the 2014/15 winter wheat crop, which accounts for about 95 percent of total wheat production, was completed in October. During sowing, generally favourable weather conditions facilitated planting activities. Above-average rains and mild weather in October and November over the main wheat-growing areas, including Yangtze Valley and much of the North China Plain, benefited vegetative growth of the winter wheat. Nationally, the area planted to wheat is estimated to remain close to last year's level of 24.1 million hectares, largely seen as a response to unchanged Minimum Support Price for the 2015 wheat crop compared with 2014. The National Development and Reform Commission (NDRC) set the minimum purchase price at CNY 2,360 per tonne (USD 385 per tonne), based on the production cost of farmers, as well as the international markets prices.

Record 2014 aggregate cereal harvest estimated

The 2014 aggregate cereal production is estimated at 555.9 million tonnes, similar to the previous year's record crop. Generally favourable weather conditions across much of the country during the growing period is the main factor contributing to the record production this year. The 2014 wheat production, harvested by mid-August, is estimated by CNGOIC at a record level of 126.2 million tonnes, up 3 percent from last year's bumper level. This is mainly the result of higher yields, following favourable weather conditions and adequate supplies of irrigation water. The 2014 maize crop, harvested in June until mid-October 2014, has been set at 215.7 million tonnes, slightly below last year's record high, as yields are estimated to have returned to average level. The 2014 rice harvest is officially estimated at a record level of 205 million tonnes, 1 percent up from last year's bumper harvest. The anticipated increase in production is mainly attributed to a small expansion in area planted, prompted by higher Minimum Purchase Prices and other Government support measures, including direct payments to farmers and subsidies to seed and machinery as well as other agricultural inputs. The excessive rains in mid-May across southern parts of China, which led to localized damage to the early double rice crop, as well as dry conditions between June and July in parts of the main growing Yangtze River Valley, had overall a limited impact on rice production.

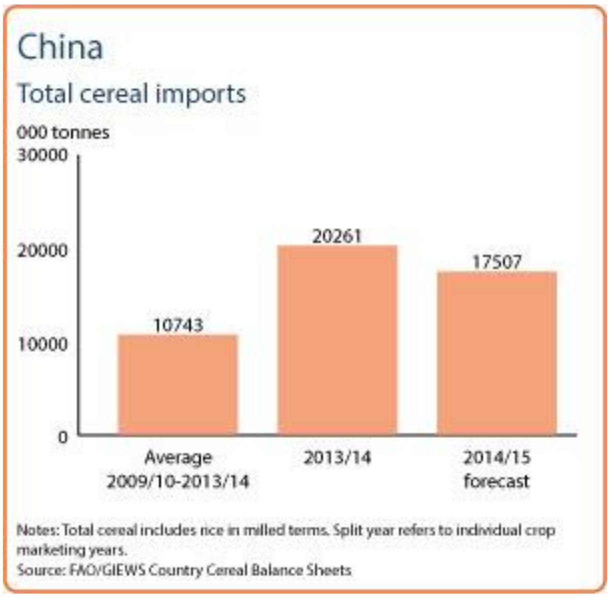
Cereal imports in 2014/15 marketing year forecast to decrease from last year's record level

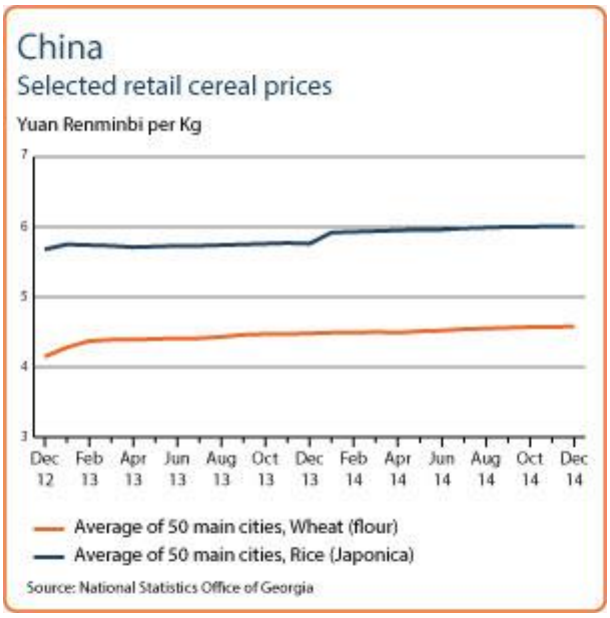
Total cereal imports in the 2014/15 marketing year are forecast to decrease from last year's record level and reach 17.5 million tonnes, some 14 percent below the estimated imports in 2013/14. The decrease is mainly attributed to lower wheat imports, which are projected at 3 million tonnes, less than half the record level of the previous year, given this year's record harvest and large carryover stocks. Similarly, maize imports are expected to decrease by 9 percent to 3 million tonnes.

For rice, imports in 2014 are forecast to remain similar to last year's below-average level of 2.4 million tonnes.

Prices of rice and wheat remain stable

Retail prices of Japonica rice and wheat flour remained stable in November despite good supplies from the ongoing 2014 main harvest and adequate imports in the past months. Prices continued to be underpinned by high Minimum Support Prices and the recent reinforcement on import controls. The latest official data indicate that the year-on-year consumer price index increased by 1.4 percent in November 2014.





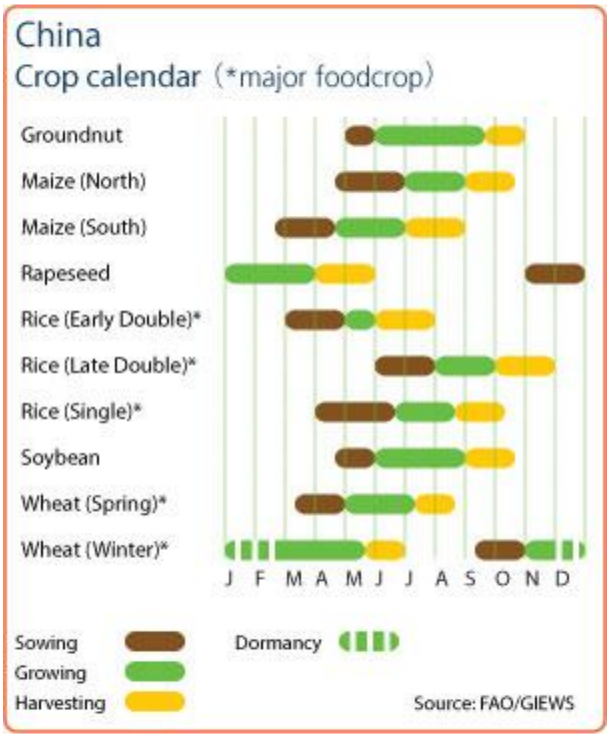
GIEWS Country Brief

China (Mainland)

Reference Date: 25-September-2014

FOOD SECURITY SNAPSHOT

- The 2014 aggregate cereal harvest anticipated at a record level
- Aggregate cereal imports in 2014/15 forecast to decrease from last year's record level
- Prices of rice and wheat remain stable



The 2014 aggregate cereal harvest is forecast at a record level

Harvesting of the 2014 early double rice crop was completed at the end of July, while that of single and late double crops will be concluded by November. On average, output of the single rice crop normally amounts to about 66 percent of the national rice production, with the remaining two harvests (early and late double) representing 17 percent, respectively. Latest forecasts from the China National Grain and Oils Information Centre (CNGOIC) put this year's aggregate rice harvest at a record level of 205 million tonnes, marginally above last year's good level. The anticipated increase in production is mainly attributed to a small expansion in area planted, prompted by higher Minimum Purchase Prices (MSP) and other Government support measures, including direct payments to farmers and subsidies to seed and machinery as well as other agricultural inputs. The excessive rains in mid-May across southern parts of China, which led to localized damage to the early double rice crop, as well as dry conditions between June and July in parts of the main growing Yangtze River Valley, had overall a limited impact on rice production.

Harvesting of the 2014 maize crop was completed in late August in the south and is currently in full swing in northern areas of the country. FAO's latest forecast points to a maize crop of 220 million tonnes, slightly above last year's record output. The expected increase mainly reflects a small expansion in plantings, in response to rising demand for feed grains.

The 2014 wheat production, harvested by mid-August, is estimated by CNGOIC at a record level of 125.3 million tonnes, up 3 percent from last year's bumper level. This is mainly the result of higher yields, following favourable weather conditions and adequate supplies of irrigation water.

China

Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Rice (paddy)	199 943	203 612	205 010	1
Maize	191 621	218 489	220 000	1
Wheat	118 093	121 926	125 300	3
Others	9 004	9 412	9 032	-4
Total	518 661	553 439	559 342	1

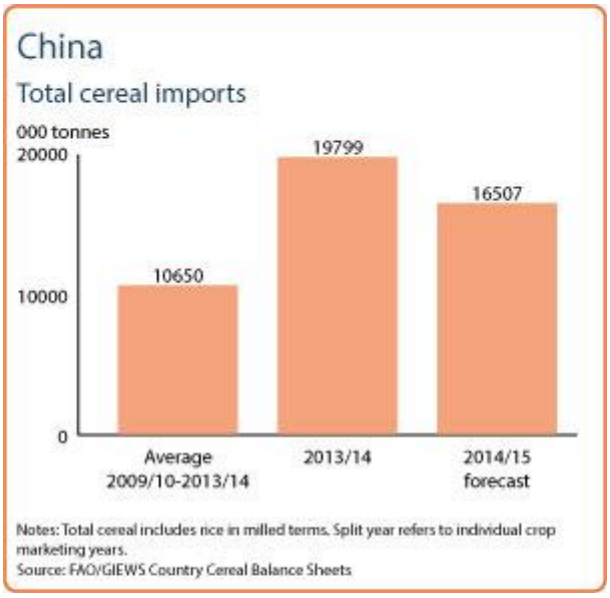
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

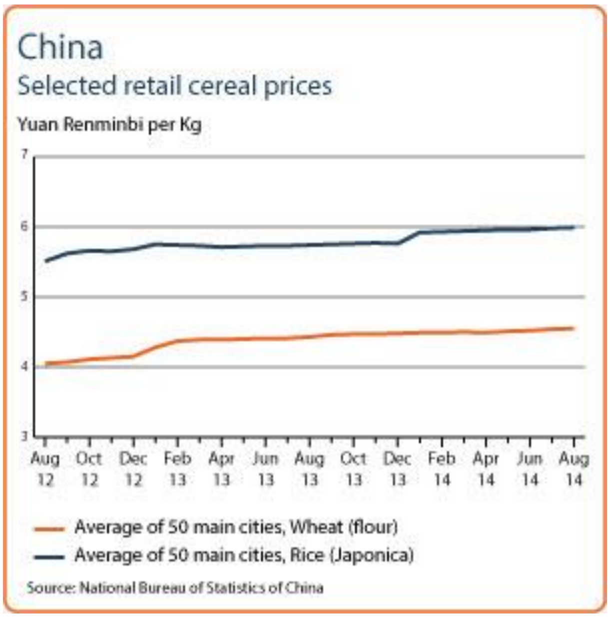
Cereal imports in the 2014/15 marketing year forecast to decrease from last year's record level

Total cereal imports in the 2014/15 marketing year are forecast to decrease from last year's record level and reach 16.5 million tonnes, some 17 percent below the estimated imports in 2013/14. Maize and wheat import requirements are forecast to fall by 25 percent to 3 million tonnes and 40 percent to 4 million tonnes from last year's level, respectively, given the anticipated good harvest and large carryover stocks. For rice, imports in 2014 are forecast to remain similar to last year's below-average level of 2.4 million tonnes.

Prices of rice and wheat remain stable

Retail prices of Japonica rice and wheat flour were stable in August, following good supplies from the 2014 harvests and increased import volumes in the past months. Overall, prices were slightly above their levels a year earlier, consistent with the year-on-year general inflation rate. The latest official data indicate that the year-on-year consumer price index increased by 2 percent in August 2014.





GIEWS Country Brief

China (Mainland)

Reference Date: 12-June-2014

FOOD SECURITY SNAPSHOT

- The 2014 wheat production is estimated at record levels
- Favourable prospects for the 2014 rice and maize crops
- Aggregate cereal imports in 2013/14 to reach a record level
- Prices of rice and wheat remain stable

The 2014 wheat production is estimated at record levels

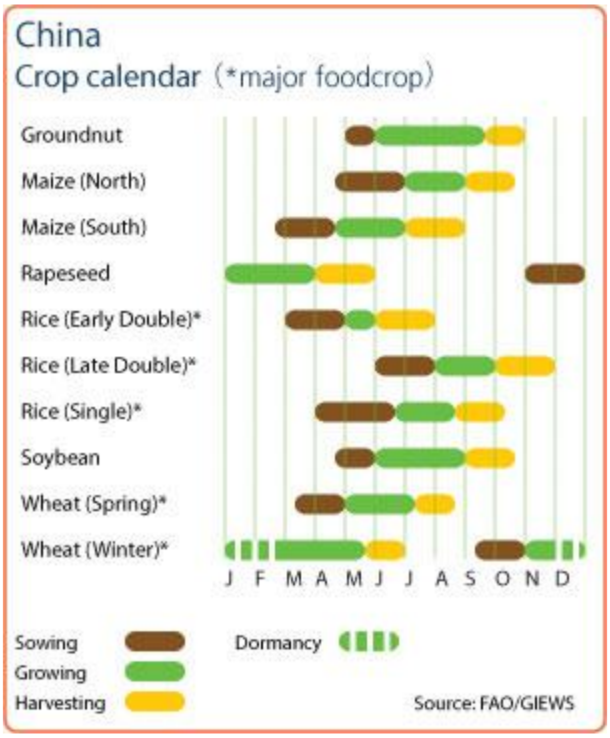
Harvesting of the 2014 winter wheat, accounting for about 95 percent of annual wheat production, is nearing completion, while that of small amounts of spring wheat will be concluded by mid-August. Latest estimates from China National Grain and Oils Information Centre put this year's wheat production at a record level of 122.6 million tonnes, marginally above last year's bumper level. This is mainly the result of a slight expansion in plantings, prompted by higher Minimum Purchase Prices (MSP) and other Government support measure, including direct payments to farmers, seed and machinery subsidies and other agricultural inputs.

Planting of the 2014 early double and single rice crops is completed, while that of late double crop will be concluded by the end of August. Output of the single rice crop normally amounts to about 66 percent of the national rice production, with the remaining two harvests (early and late double) representing 17 percent each. Overall, the rainfall situation has been favourable between March and April over most of the rice producing areas. However, in May, parts of Yangtze River Valley, which accounts for almost 70 percent of total rice production, experienced below-average rains reducing soil moisture supplies particularly for the single rice crop. However, the availabilities of water for irrigation are reported at good levels; therefore, the impact of the dry spell on the rice production is expected to be minimal. The total area planted to rice this year is officially estimated at 30.8 million hectares, slightly higher than the record level of the previous year. Assuming favourable weather for the reminder of the season and given the continued Government support to the rice sector, the aggregate 2014 rice production is forecast at 207.4 million tonnes, up 2 percent from the 2013 bumper output.

Planting of the 2014 maize crop was completed in late May in the south and is currently in full swing in northern areas of the country. FAO's latest forecast point to an aggregate maize crop of 219 million tonnes, slightly above last year's record output. The expected increase is mainly attributed to a slight expansion in the area planted, in response to rising demand for feed grains.

Cereal imports in the 2013/14 marketing year to reach record levels

Total cereal imports are forecast to increase sharply in the 2013/14 marketing year to a level of 22.1 million tonnes, more than twice the estimated imports in 2012/13. A strong demand for high-quality wheat is seen to have boosted wheat purchases to 8.5 million tonnes in 2013/14 marketing year (July/June), up 5.6 million tonnes from the previous year's level and the highest since the mid-1990s. For maize, despite a record harvest in 2013, imports in 2013/14 (October/September) could reach an



China

Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Rice (paddy)	199,878	203,290	207,440	2
Maize	191,471	217,740	219,000	1
Wheat	118,052	121,720	122,600	1
Others	9,010	9,442	9,241	-2
Total	518,411	552,192	558,281	1

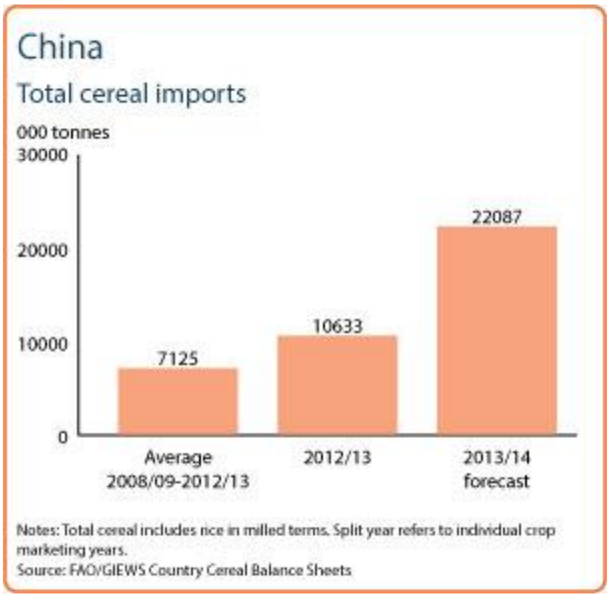
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

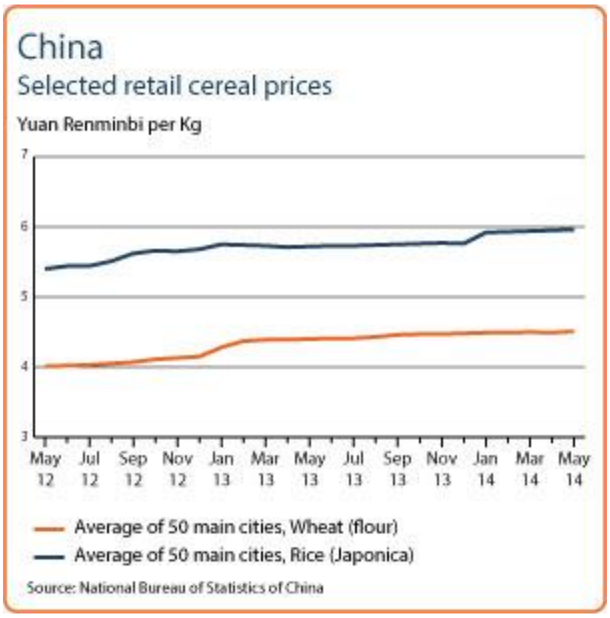
all-time high of 5.5 million tonnes, up 2.8 million tonnes from the previous year, due to sustained continued strong domestic demand.

Prices of rice and wheat remain stable

Retail prices of Japonica rice and wheat flour were stable in May, reflecting adequate supplies from imports in the past months. Favourable prospects for the 2014 harvests also contributed to price stability. Overall, prices were slightly above their levels a year ago, consistent with the year-on-year general inflation rate.

The latest official data indicate that the year-on-year consumer price inflation increased by 2.5 percent in May 2014.





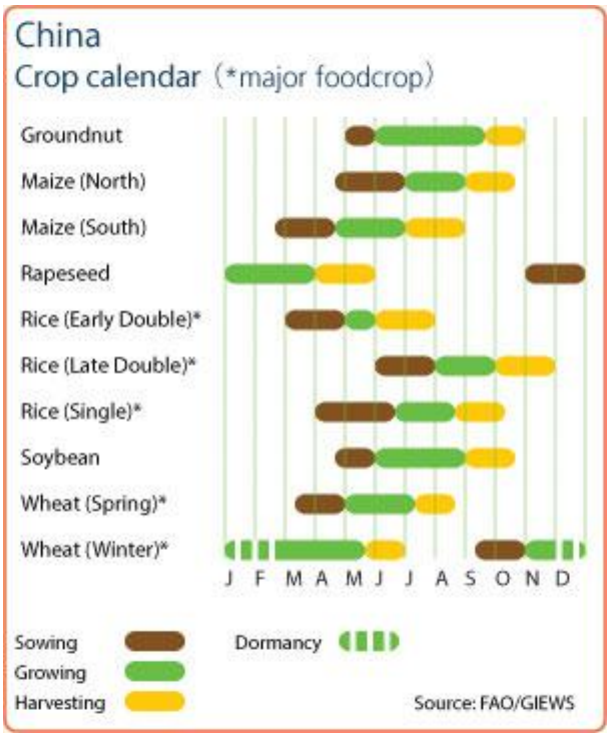
GIEWS Country Brief

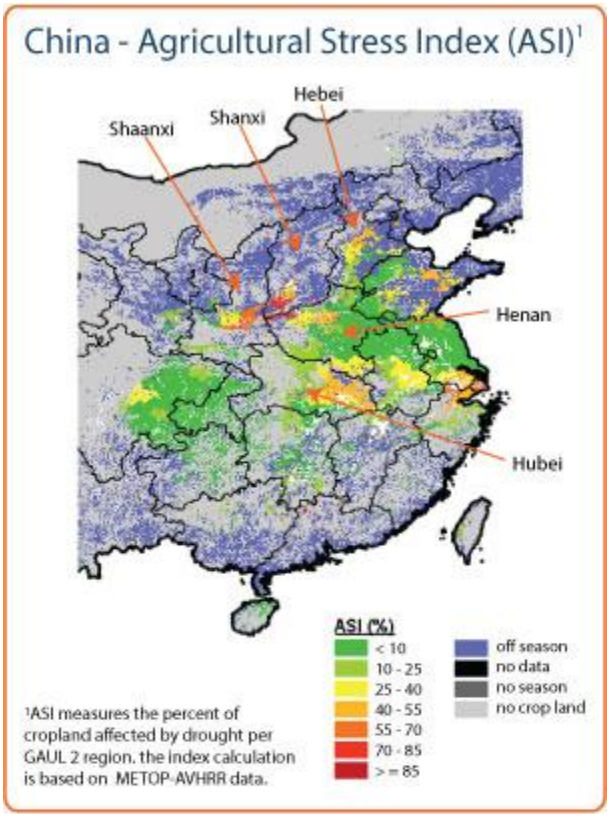
China (Mainland)

Reference Date: 16-April-2014

FOOD SECURITY SNAPSHOT

- Rains in April after prolonged dry spell improved prospects for the 2014 wheat crop
- Aggregate cereal imports in 2013/14 to reach a record level
- Prices of rice and wheat remain generally stable





Rains in April after prolonged dry spell improved prospects for the 2014 wheat crop

The 2014 winter wheat crop, which accounts for about 95 percent of total wheat production, is at advanced vegetative to flowering stages and harvesting will start in late May. Generally favourable weather conditions from the start of the season in November to February supported planting and development of the early planted wheat crop. However, below-average rains and higher than normal temperatures between March and early April in parts of the North China Plain, resulted in stressed vegetation conditions in parts of some important growing areas, including Shandong and Hebei. Rains resumed to more normal patterns during the second dekad of April, bringing some relief to dry areas. Supplementary irrigation remains necessary. The final outcome of the season will depend on rainfall performance in the remaining of the growing season. FAO's latest forecast points to an aggregate 2014 wheat crop (including winter and spring seasons) of about 122 million tonnes, similar to last year's record output. The projected good outcome is mainly attributed to the Government support, including the direct payments to farmers, the Minimum Purchase Prices (MSP), seed and machinery subsidies and other inputs, that has prompted a slight increase in plantings this season.

Planting of the 2014 early rice crop is currently ongoing in southern areas of the country and will continue until the end of April. The rainfall across southern China has been above average since the start of the season, significantly boosting moisture supplies and benefiting planting activities. Assuming a normal upcoming monsoon season and given the continued Government support to the rice sector, the aggregate 2014 rice production is forecast at 204.5 million tonnes, slightly above last year's record output.

Planting of the 2014 maize crop started in the south and will be concluded by July in the north. The 2014 aggregate maize production is initially forecast at 218 million tonnes, similar to last year's record output. The increase is mainly attributed to a projected slight increase in the area planted, in response to rising demand for feed grains.

Cereal imports in the 2013/14 marketing year to reach record levels

Total cereal imports are forecast to increase considerably to 22.1 million tonnes in the 2013/14 marketing year, more than double the estimated imports in 2012/13. A strong demand for high-quality wheat is seen to boost wheat purchases to 8.5 million tonnes in the 2013/14 marketing year (July/June), up 5.6 million tonnes from the previous year's level and the highest since the mid-1990s. For maize, despite expectations of a record harvest in 2013, its purchases in

2013/14 (October/September) could reach an all-time high of 5.5 million tonnes, up 2.8 million tonnes from the previous year due to continued strong domestic demand.

Prices of rice and wheat remain generally stable

Retail prices of Japonica rice and wheat flour remained generally stable in the past few months, despite recent high imports and favourable prospects for the 2014 paddy and wheat crops harvests. Prices continued to be supported by strong domestic demand and high Minimum Support Prices (MSP).

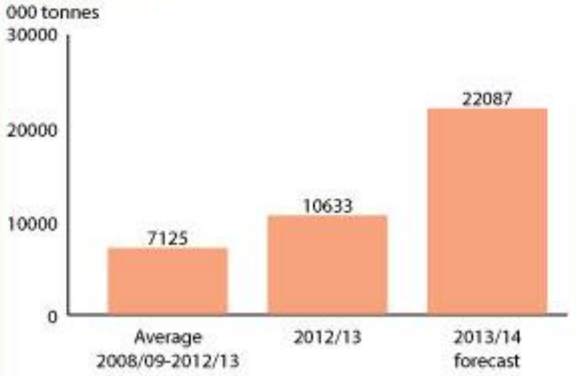
The latest official data indicate that the year-on-year consumer price inflation increased by 2.4 percent in March 2014.

China
Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Rice (paddy)	199,878	203,290	204,500	1
Maize	191,471	217,740	218,000	0
Wheat	118,142	122,170	122,000	0
Others	9,010	9,442	9,227	-2
Total	518,501	552,642	553,727	0

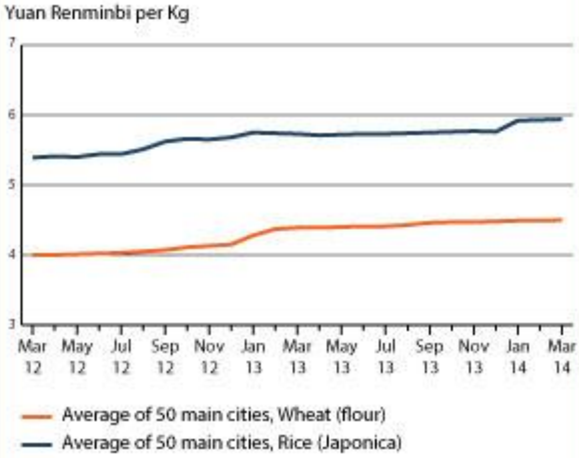
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

China
Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

China
Selected retail cereal prices



Source: National Bureau of Statistics of China

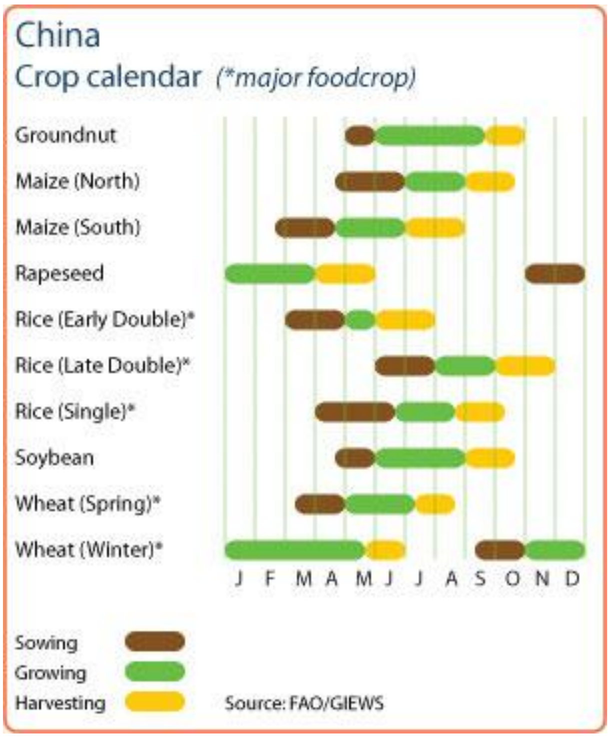
GIEWS Country Brief

China (Mainland)

Reference Date: 28-January-2014

FOOD SECURITY SNAPSHOT

- Marginal increase in the 2013/14 winter wheat plantings
- Record 2013 cereal harvest estimated
- Total cereal imports in 2013/14 to reach a record level
- Prices of rice remain generally stable, while those of wheat reach record levels



Marginal increase in the 2013/14 winter wheat plantings

Planting of the 2013/14 winter wheat crop, which accounts for about 95 percent of total wheat production, was completed in October. During sowing, generally favourable (dry and warm) weather conditions facilitated timely land preparation and planting in the main wheat growing areas. From mid-November, the remnants of Typhoon *Haiyan*, brought ample rains across southern China while parts of the North China Plain has been experiencing generally below-average rains over the same period. Nationally the area planted to wheat is preliminary estimated to have increased marginally from, at 22.76 million hectares, largely seen as a response to consecutive increases of the Minimum Support Price.

China

Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes			percent
Rice (paddy)	197,600	204,236	202,750	-1
Maize	181,106	205,614	213,000	4
Wheat	116,199	120,844	122,170	1
Others	9,097	9,017	9,442	5
Total	504,002	539,711	547,362	1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Record 2013 cereal harvest estimated

The 2013 aggregate cereal production is estimated at 547.4 million tonnes, marking an increase of 1.4 percent relative to the previous year's record crop. Generally favourable weather throughout the country during growing period was the main reason for the increase in production. However, a prolonged dry-spell in some central and eastern parts between early July and mid-August and a succession of tropical storms/typhoons and heavy rains, which resulted in localized floods from mid-August, particularly in southern and northeastern parts of the country, prevented a potentially larger crop in 2013.

Harvesting of the 2013 main winter wheat crop was completed in June, while that of secondary spring wheat was finalised by mid-August. The total 2013 wheat output is estimated at 122.2 million tonnes, slightly above previous year's record harvest. The 2013 maize crop, harvested in June until mid-October 2013, also reached a record level at 213 million tonnes, 4 percent over the 2012 bumper harvest. The expected increase is predominantly attributed to an expansion by almost 2 percent in the area planted as well as higher yields, following favourable weather conditions. The 2013 rice harvest, on the hand, is estimated to decrease to 202.8 million tonnes, indicating a 1 percent drop from the record harvest in 2012. This reflects a prolonged dry spell in some central and eastern parts of the country, including Anhui, Zhejiang and Jiangsu.

Cereal imports in 2013/14 marketing year to reach record levels

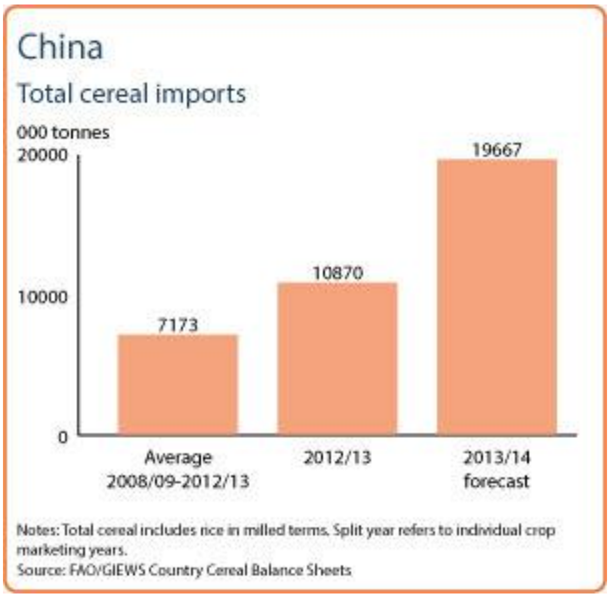
Total cereal imports are forecast to increase considerably to 19.7 million tonnes in 2013/14 marketing year, about 80 percent higher than in 2012/13. A strong demand for high quality wheat is seen to boost wheat purchases to 7.5 million tonnes in 2013/14 (July/June), up

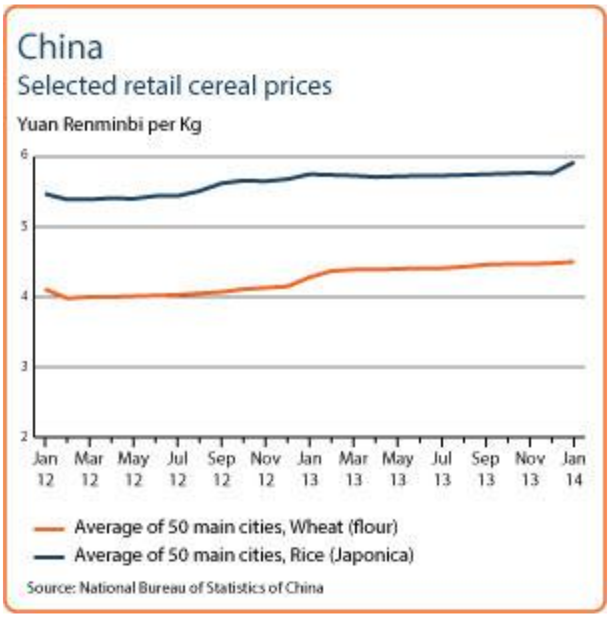
4.5 million tonnes from previous year's level and the highest since the mid-1990s. Domestic prices of the commodity in September peaked to near-record levels. For maize, despite expectation of a record harvest in 2013, its purchases in 2013/14 (October/September) could reach an all-time high of 7 million tonnes, up 2.7 million tonnes from the previous year due to continued strong domestic demand resulting in high domestic prices.

Prices of rice remain generally stable, while those of rice reach record levels

Prices of Japonica rice remained stable in January, as the downward pressure from the arrival of the 2013 intermediate late double harvest was offset by the anticipated reduction in production, following precipitation deficits and high temperatures in south central and eastern provinces in August. Higher minimum purchase prices have also supported the nominal prices. Prices of wheat flour, which had remained generally stable between January and December 2013, increased to new record levels in January, despite the release of public stocks due to strong domestic demand ahead of traditional holidays.

The latest official data indicate that the year-on-year consumer price inflation increased by 2.5 percent in December 2013.





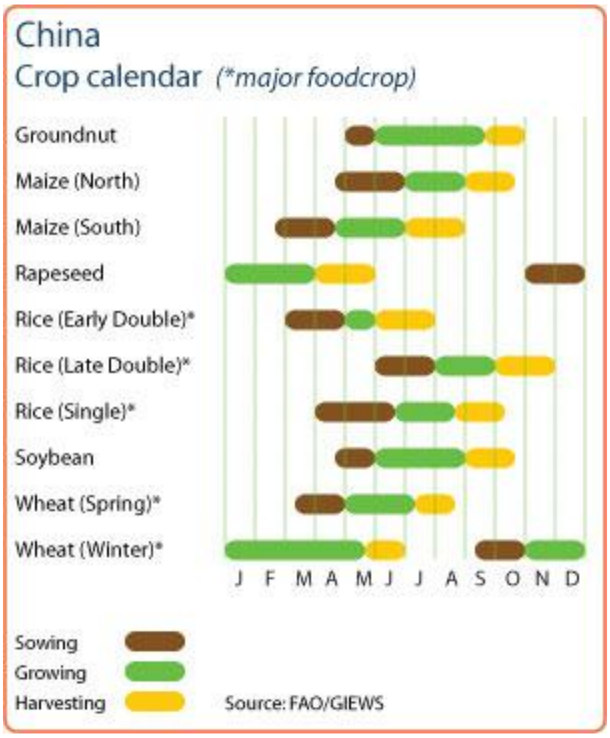
GIEWS Country Brief

China (Mainland)

Reference Date: 25-November-2013

FOOD SECURITY SNAPSHOT

- Marginal increase in the 2013/14 winter wheat plantings
- Record 2013 cereal harvest estimated
- Total cereal imports in 2013/14 to reach a record level
- Prices of rice remain generally stable



Marginal increase in the 2013/14 winter wheat plantings is expected

Planting of the 2013/14 winter wheat crop, which accounts for about 95 percent of total wheat production, was completed in October. During sowing, generally favourable (dry and warm) weather conditions facilitated timely land preparation and planting in the main wheat growing areas. From mid-November, the remnants of Typhoon *Haiyan*, brought ample rains across southern China while parts of the North China Plain has been experiencing generally below-average rains over the same period. Nationally the area planted to wheat is estimated to increase marginally from last year, at 22.76 million hectares, largely seen as a response to consecutive increases of the Minimum Support Price.

China

Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes			percent
Rice (paddy)	197,600	204,236	202,750	-1
Maize	181,106	205,614	213,000	4
Wheat	116,199	120,844	122,170	1
Others	9,097	9,017	9,442	5
Total	504,002	539,711	547,362	1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Record 2013 cereal harvest estimated

The 2013 aggregate cereal production is estimated at 547.4 million tonnes, marking an increase of 1.4 percent relative to the previous year's record crop. Generally favourable weather throughout the country during growing period was the main reason for the increase in production. However, a prolonged dry-spell in some central and eastern parts between early July and mid-August and a succession of tropical storms/typhoons and heavy rains, which resulted in localized floods from mid-August, particularly in southern and northeastern parts of the country, prevented a potentially larger crop this year.

Harvesting of the 2013 main winter wheat crop was completed in June, while that of secondary spring wheat was finalised by mid-August. The total 2013 wheat output is estimated at 122.2 million tonnes, slightly above previous year's record harvest. The 2013 maize crop, harvested in June until mid-October 2013, also reached a record level at 213 million tonnes, 4 percent over the 2012 bumper harvest. The expected increase is predominantly attributed to an expansion by almost 2 percent in the area planted as well as higher yields, following favourable weather conditions. The 2013 rice harvest, on the hand, is estimated to decrease to 202.8 million tonnes, indicating a 1 percent drop from the record harvest of a year before. This reflects a prolonged dry spell in some central and eastern parts of the country, including Anhui, Zhejiang and Jiangsu.

Cereal imports in 2013/14 marketing year to reach record levels

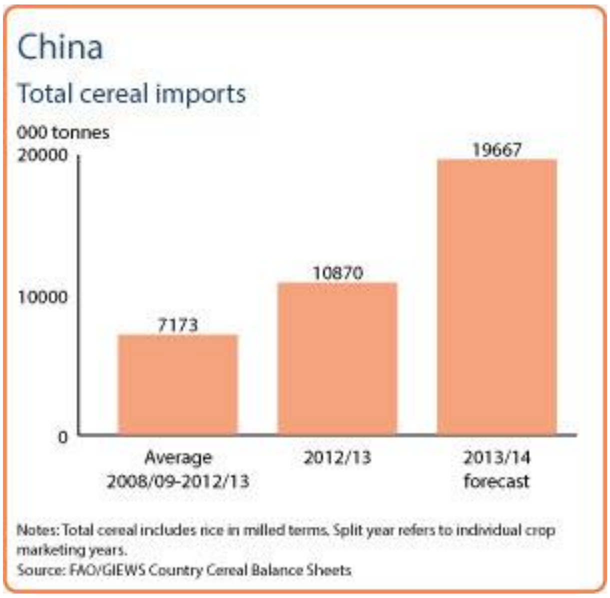
Total cereal imports are forecast to increase considerably to 19.7 million tonnes in 2013/14 marketing year, about 80 percent higher than in 2012/13. A strong demand for high quality wheat is seen to boost wheat purchases to 7.5 million tonnes in 2013/14 (July/June), up 4.5 million tonnes from last year's level and the highest since the mid-

1990s. Domestic prices of the commodity in September peaked to near-record levels. For maize, despite expectation of a record harvest this year, its purchases in 2013/14 (October/September) could reach an all-time high of 7 million tonnes, up 2.7 million tonnes from the previous year due to continued strong domestic demand resulting in high domestic prices.

Prices of rice remain generally stable

Prices of rice and those of wheat flour have remained generally unchanged since January 2013, mainly reflecting adequate supplies from the 2013 harvest and large imports in the past months. However, currently they are above their levels a year earlier, mainly due to consecutive increases of the Minimum Support Prices.

The latest official data indicate that the year-on-year consumer price inflation increased by 3.2 percent in October 2013.



GIEWS Country Brief

China (Mainland)

Reference Date: 30-April-2013

FOOD SECURITY SNAPSHOT

- The 2013 winter wheat production is estimated to increase slightly
- Record 2012 cereal harvest estimated
- Cereal imports in 2012/13 marketing year estimated to decrease
- Rice prices remain generally stable, while those of wheat firm up in March

The 2013 winter wheat production is estimated to increase slightly

Harvesting of the 2012/13 winter wheat crop, which accounts for about 95 percent of total wheat production, is expected to start from late May and continue into June. Favourable weather conditions at the start of the season, between November and January, over large parts of the country improved soil moisture, and together with seasonably cool weather aided early development of crops. However, significant water deficits developed since mid-February over large parts of the North China Plain, particularly affecting Anhui, Hebei, Henan, northern Jiangsu and Shandong provinces. At national level, however, the impact of the dry spell on the 2013 wheat production is expected to be limited. Latest official projections point to a total wheat crop (including winter and spring seasons) of about 121 million tonnes, similar to the last year's record harvest. The good outcome is mainly attributed to adequate provision of subsidised high-quality seeds and yield promoting inputs.

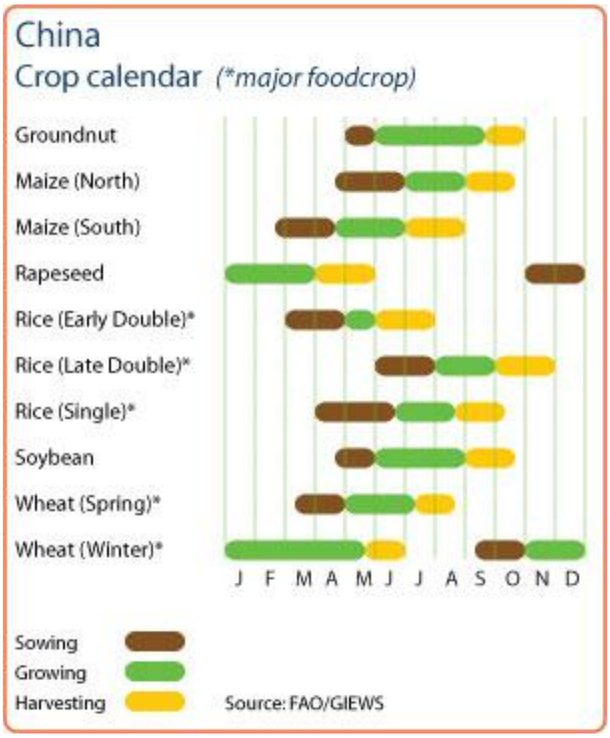
Record 2012 cereal harvest estimated

The 2012 aggregate cereal production is finalized at 541.8 million tonnes, marking an increase of 4.3 percent relative to the previous year's another record crop. Generally, favourable weather across much of the country during growing period and continued government input assistance, which supported larger planting and yields, were the main factors contributing to the increased production, despite localized pest infestations of wheat and rice crop, particularly in important cereal producing provinces of Jiangsu, Anhui and southern parts of Henan located in the North China Plain as well as Guangdong, Hubei, Sichuan and Jiangxi provinces.

The aggregate 2012 wheat output is estimated to increase to 120.6 million tonnes, some 3 percent up on 2011, reflecting strong government support to the sector.

The 2012 maize crop, harvested in June until mid October 2012, reached a record level at 208.1 million tonnes, 8 percent over the 2011 record harvest. The expected increase is predominantly attributed to an expansion of almost 4.2 percent in the area planted.

Harvesting of the 2012 rice crop was completed in last November. Reflecting increase in paddy plantings and high yields, the aggregate rice harvest (in paddy terms) is estimated to increase to 204.3 million tonnes, indicating a 1.6 percent increase from the harvest of a year before. However, a surge in pest infestations (plant hopper and blast



China
Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes			percent
Rice (paddy)	197,610	204,285	207,000	1
Maize	181,609	208,130	218,660	5
Wheat	116,146	120,580	121,019	0
Others	9,061	8,836	8,858	0
Total	504,426	541,831	555,537	3

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

attacks) led to some localised paddy crop losses, particularly impacting important producing areas, including Jiangxi, Sichuan, and Guangdong.

Cereal imports in 2012/13 marketing year estimated to decrease

In response to the higher production levels in 2012, the cereal import requirement in the 2012/13 marketing year (October/September) is forecast at 10.8 million tonnes, about 17 percent lower than in 2011/12 marketing year.

Despite China's growing demand for feed use, maize imports are expected to fall to 3.5 million tonnes, down 33 percent compared to 2011/12 marketing year. This decrease mainly reflects a halt in purchase after the considerably higher maize prices, due to the drought in USA this year.

Prices of rice remain generally stable, while those of wheat firm up in March

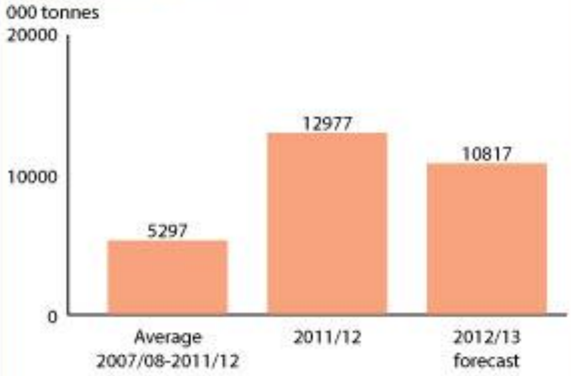
Prices of rice remained generally stable since September 2012, following good harvest in 2012 and large imports in the past few months. By contrast, prices of wheat flour, another important staple, firmed up in March after a steady increase since September 2012.

Wheat prices were supported by strong demand and higher minimum procurement prices. The recent announcement of an increase in retail prices for fuel added to the upward pressure on prices. In an attempt to lower wheat prices, the Government announced in early March the release of 1.3 million tonnes of wheat from state reserves.

The latest official data indicate that the year-on-year consumer price inflation (CPI) decreased to 2.1 percent in March 2013 from 3.2 percent in February 2013.

China

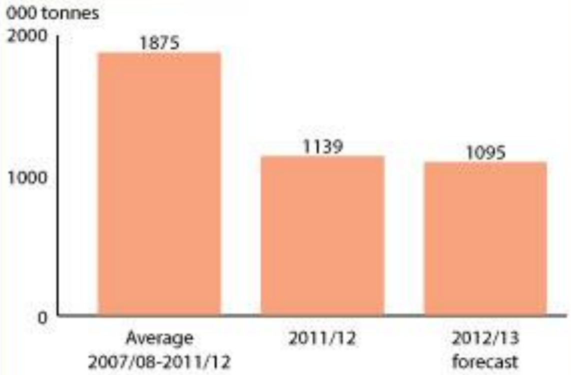
Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

China

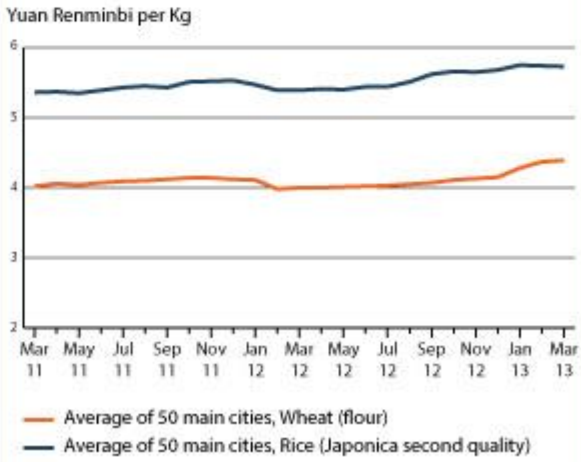
Total cereal exports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

China

Selected retail cereal prices



Source: National Bureau of Statistics of China

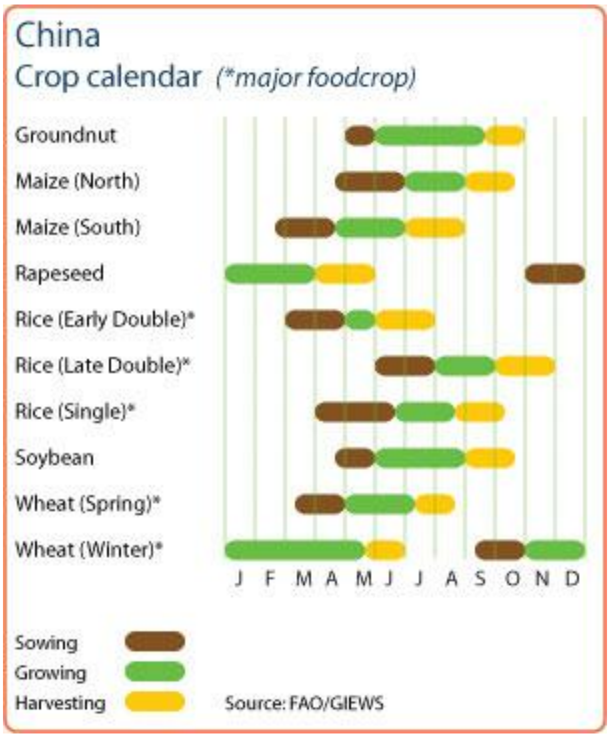
GIEWS Country Brief

China (Mainland)

Reference Date: 21-December-2012

FOOD SECURITY SNAPSHOT

- Generally favourable weather at the start of the 2012/13 winter cropping season
- Record 2012 cereal harvest estimated
- Cereal imports in 2012/13 marketing year estimated to decrease
- Cereal prices remain generally stable



Generally favourable weather at the start of the 2012/13 winter cropping season

Planting of the 2012/13 winter wheat crop, which accounts for about 95 percent of total wheat production, was completed in October. During sowing, warm and generally dry weather facilitated timely land preparation and planting in the main wheat growing areas. Favourable rainfall between November and mid-December over large parts of the country improved soil moisture, and together with seasonably cool weather aided vegetative development of the crops. However, parts of the North China Plain and the Sichuan Basin experienced generally minor rainfall deficits over the same period. Reportedly, area planted to winter wheat is estimated to increase slightly compared to the last year, largely seen as s response to higher minimum purchase prices set by the government. Adequate provision of subsidised high-quality seeds and yield promoting inputs are expected to assist crop productivity.

China

Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes			percent
Rice (paddy)	193,959	201,001	205,000	2
Maize	170,443	192,781	208,130	8
Wheat	113,890	117,401	120,580	3
Others	9,533	8,543	8,836	3
Total	487,825	519,726	542,546	4

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Record 2012 cereal harvest estimated

The 2012 aggregate cereal production is estimated at 542.5 million tonnes, marking an increase of 4.4 percent relative to the last year's another record crop. Generally, favourable weather across much of the country during growing period and continued governmental input assistance, which supported larger planting and yields, are the main factors contributing to the increased production. However, pest infestations led to some localised wheat and rice crop losses, particularly impacting important cereal producing provinces of Jiangsu, Anhui and southern parts of Henan located in the North China Plain as well as Guangdong, Hubei, Sichuan and Jiangxi provinces.

Harvesting of the 2012 main winter wheat crop was completed in June, while that of secondary spring wheat was finalised by mid-August. In aggregate, 2012 wheat output is estimated to increase to 120.6 million tonnes, some 3 percent up on 2011, reflecting strong government support to the sector.

The 2012 maize crop, harvested in June until mid October, reached a record level at 208.1 million tonnes, 8 percent over the 2011 record harvest. The expected increase is predominantly attributed to an expansion of almost 4.2 percent in the area planted.

Harvesting of the 2012 rice crop was complete in November. Reflecting increase in paddy plantings and high yields, the aggregate rice harvest (in paddy terms) is estimated to increase to 205 million tonnes, indicating a 2 percent increase from the harvest of a year before. However, a surge in pest infestations (plant hopper and blast attacks) led to some localised paddy crop losses, particularly impacting important producing areas, including Jiangxi, Sichuan, and Guangdong.

Cereal imports in 2012/13 marketing year estimated to decrease

In response to the higher production levels in 2012, the cereal import requirements in the 2012/13 marketing year (October/September) is estimated at 8 million tonnes, about 37 percent lower than last year.

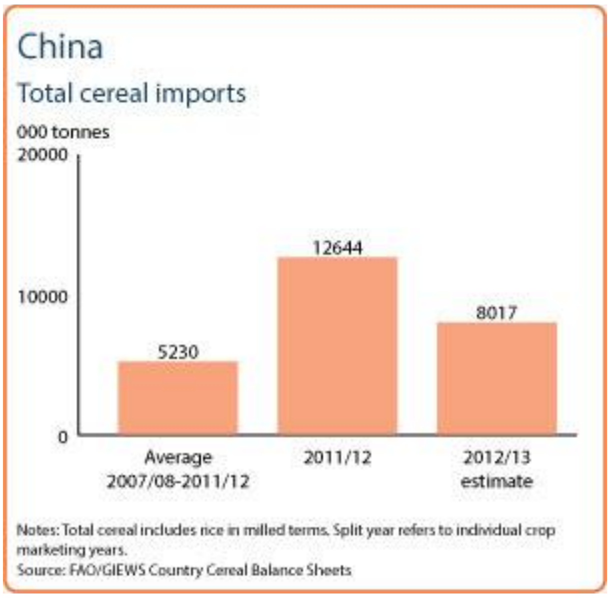
Despite China's growing demand for feed use, maize imports are expected to fall to 2 million tonnes, down 61 percent compared to 2011/12 marketing year. This decrease mainly reflects a halt in purchase after the considerably higher maize prices, due to the drought in USA this year.

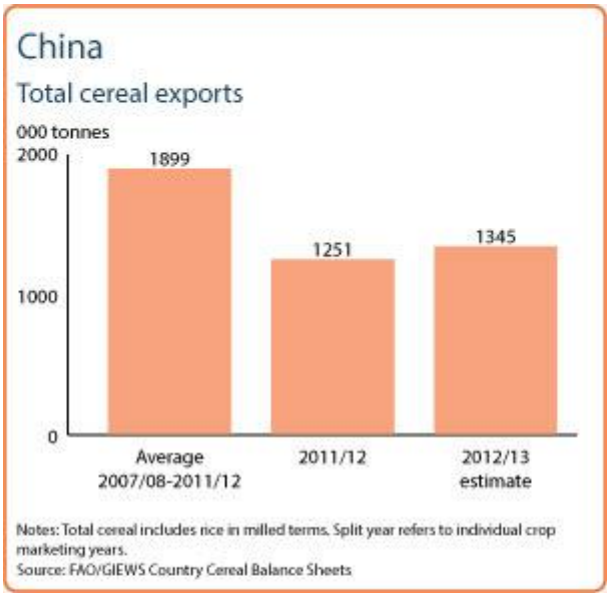
Prices of rice and wheat remain generally stable

Prices of rice, which had increased steadily over the past months, stabilized since September 2012. The downward pressure on prices from the arrival of the 2012 "late double" rice crop into the markets was offset by large-scale Government procurement from domestic markets . Prices of wheat flour, another important staple, remained virtually unchanged and similar to their levels a year earlier, following adequate supplies from the record 2012 harvest and high imports in the current marketing year (July/June).

Overall, recent declines in non-cereal food prices have contributed to a reduced inflation. The Government has implemented a series of policy measures in efforts to stabilize most of the domestic cereal prices and markets.

The latest official data indicate that the year-on-year consumer price inflation (CPI) decreased to 1.7 percent in November 2012 from 1.9 percent in September 2012.





GIEWS Country Brief

China (Mainland)

Reference Date: 11-July-2012

FOOD SECURITY SNAPSHOT
- Estimates of the 2012 winter wheat crop revised slightly downwards
- Record 2012 cereal harvest projected
- Cereal prices remain generally stable

The 2012 winter wheat crop yields revised down due to damage caused by fungus diseases

Harvesting of the 2012 winter wheat crop, which accounts for about 94 percent of total wheat production, was completed in June.

Recent production estimates, indicate a downward revision of the 2012 winter wheat production to 111.7 million tonnes from the 114 million tonnes reported in May. This reflects lower yields than early anticipated following wet weather during the season that encouraged white ear and wheat scab diseases, particularly impacting major wheat producing provinces of Jiangsu, Anhui and southern parts of Henan located on the North China Plain as well as Hubei, Sichuan and Jiangxi provinces. At the revised level, winter wheat output is only marginally higher than the previous year's record harvest of the same season. The 2012 spring wheat crop, sown from March to April and currently ready to be harvested, is projected at 6.3 million tonnes, about 12 percent below the 2011 output of the corresponding season.

In aggregate, 2012 wheat output is expected to remain virtually unchanged from last year's level, with lower yields offsetting a slight increase in plantings.

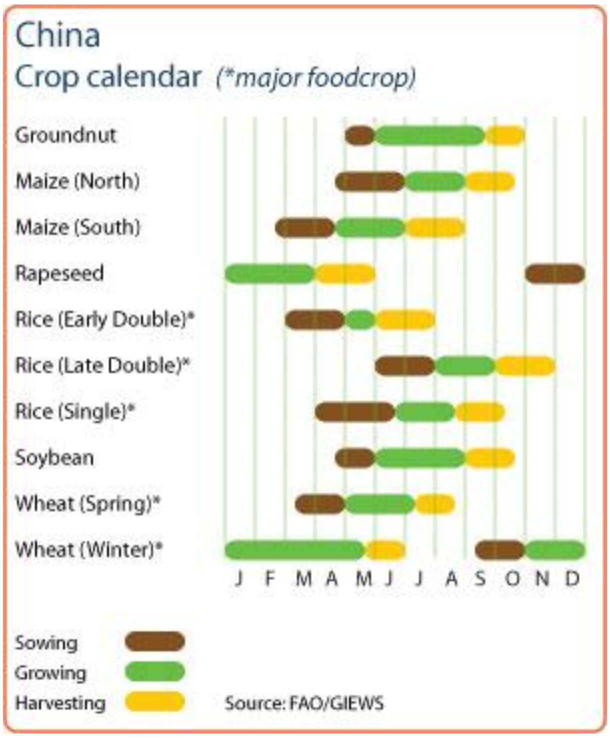
Harvesting of the 2012 maize crop began in July in the south, while the crop is at early to middle vegetative stage in the north. Crop conditions across the country are generally satisfactory. However, interior parts of North China Plain and Yangtze Valley Plain received below average precipitation since the second dekad of May, which reportedly caused crop stress and may negatively impact local production. Latest forecasts put this year's maize production at a new record level of 197.5 million tonnes, some 3 percent above the 2011 bumper harvest. The expected increase is predominantly attributed to an expansion of almost 3 percent in the planted area.

Cereal imports in 2012/13 marketing year forecast to reach a new record

Despite the improvement in the cereal production over the past few years, the country is expected to import about 11.6 million tonnes, slightly above last year's level. Maize imports are expected at around 6 million tonnes during 2012/13 marketing year (October/September) or 1 million tonnes more than in 2011/12. The high import level is mainly in response to China's growing demand for feed use.

Bumper 2011 cereal harvest

In spite of the exceptionally dry weather conditions in mid-year of 2011 affecting some parts of the country, total cereal production was estimated at a record level of 519 million tonnes in paddy terms or



China

Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes			percent
Rice (paddy)	193 915	200 780	205 000	2
Maize	170 237	191 750	197 500	3
Wheat	113 994	117 920	118 000	0
Others	9 533	8 543	8 836	3
Total	487 679	518 993	529 336	2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

455.7 million tonnes in milled rice. This increase was supported by the Government's effort to provide irrigation and other inputs/resources to drought-affected farmers.

Prices of rice and wheat remain generally stable

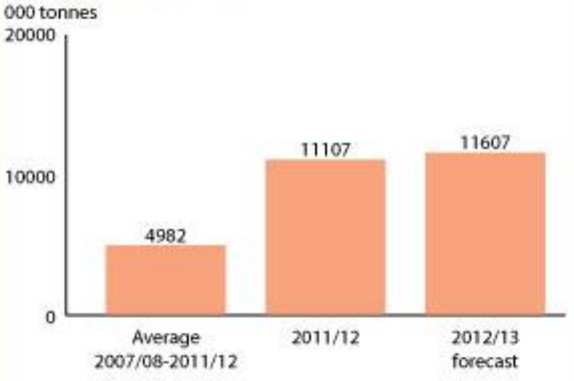
Prices of rice and wheat flour, which had increased over the last two years, stabilized since January 2012, reflecting adequate supplies from the record harvest in 2011. However, in June 2012, the average price of wheat flour was only some 1.2 percent below the high levels of a year ago, while prices of rice were marginally above their levels of a year earlier.

Overall, recent declines in non-cereal food prices have contributed to a reduced inflation. The Government has implemented a series of policy measures in efforts to stabilize most of the domestic cereal prices and markets.

The latest official data indicate that the year-on-year consumer price inflation (CPI) decreased to 2.2 percent in June 2012 from 3 percent in May 2012.

China

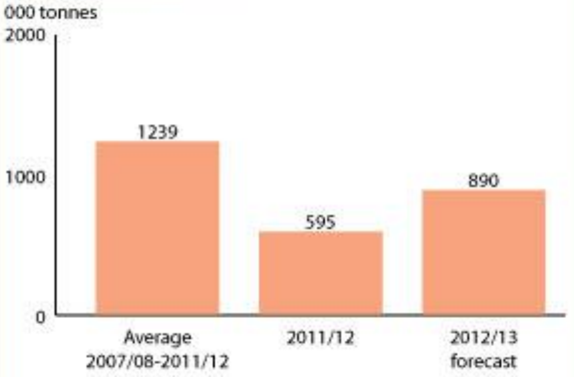
Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

China

Total cereal exports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

China

Selected retail cereal prices

Source: National Bureau of Statistics of China

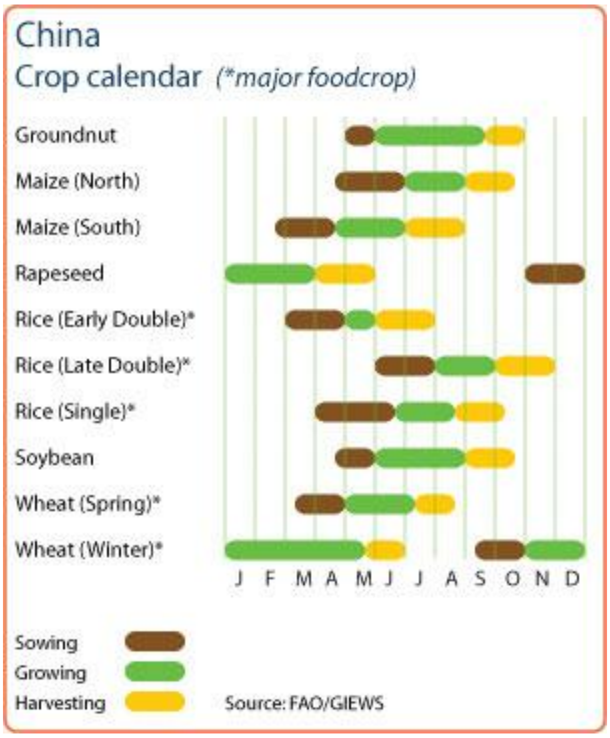
GIEWS Country Brief

China (Mainland)

Reference Date: 13-February-2012

FOOD SECURITY SNAPSHOT

- Generally favourable beginning of 2012 winter crops, mainly wheat and barley
- Record 2011 cereal harvest estimated despite a prolonged dry conditions in parts of the country during the year
- Cereal prices continue to rise



Generally favourable beginning of 2012 winter crops, mainly wheat and barley

Planting of the 2011/12 winter wheat crops is complete. Northern areas of the country received average to above average rains during the first three months of the 2011/12 agricultural season (September-November), but dry weather has prevailed since December. By contrast, south-western, south-eastern and central parts of the country benefited from generally good rains since September, which have had a beneficial impact on planting and crop emergence.

Record 2011 cereal harvest estimated despite a prolonged dry conditions in parts of the country during the year

In spite of the exceptionally dry weather conditions in mid-year affecting some parts of the country, total cereal production has been estimated at a record level of 512.1 million tonnes including paddy or 448.7 million tonnes including milled rice. This increase was supported by the Government's effort to provide irrigation and other inputs/resources to drought affected farmers.

The harvest of the 2011 secondary spring wheat crop was completed in August and the winter wheat crop was gathered earlier. The 2011 aggregate wheat output is estimated at a record level of 116.8 million tonnes, indicating a slight increase over the previous year's bumper output.

Harvesting of the 2011 maize crop began in April in the south and continued until mid-October in the north. The 2011 maize output reached a new level of 184.5 million tonnes, 4.1 percent over the 2010 record harvest.

Harvesting of the rice crop was completed in November. Reflecting increase in paddy plantings and high yields, the aggregate rice harvest (in paddy terms) was upgraded to 201.5 million tonnes, indicating a 2.9 percent increase from the harvest of a year before. The total paddy production experienced an upward trend over the last ten years. The production augmentation is also seen as partly a response to the higher procurement prices and some liberalization of the cereal market.

Despite the significant improvement in the cereal production over the past few years, China (Mainland), the country is expected to import about 4.5 million tonnes of maize during 2012 or 3.5 million tonnes more than in 2011. This high import level is in response to China's growing demand for feed and the increasingly high domestic maize price. The total cereal imports for the 2011/12 marketing year are

China

Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes			percent
Rice (paddy)	190 103	195 761	201 500	3
Maize	162 208	177 245	184 500	4
Wheat	112 103	115 180	116 790	1
Others	10 053	9 291	9 355	1
Total	474 466	497 477	512 145	3

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

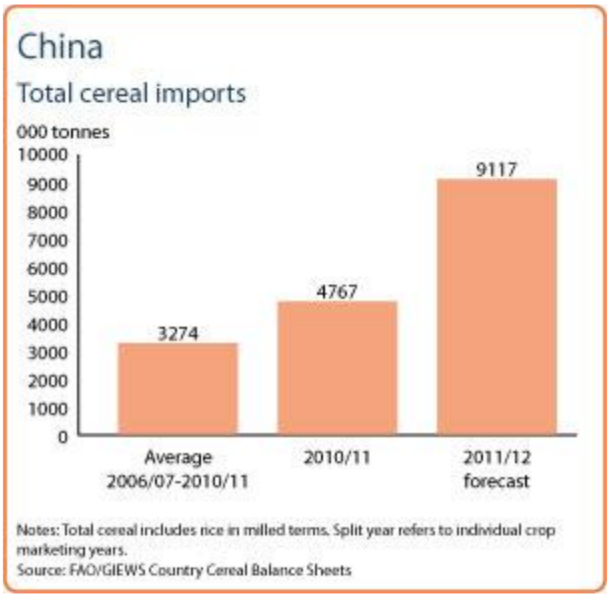
forecast to reach a new record level at 9.1 million tonnes.

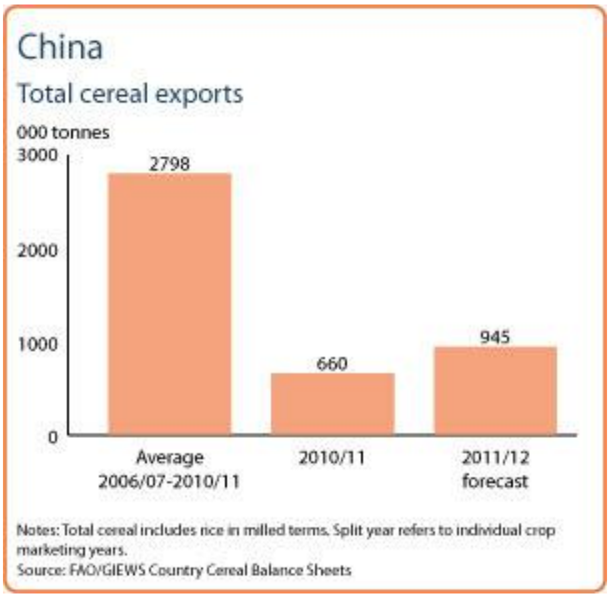
Cereal prices stabilize in January

Prices of rice and wheat flour have been rising steadily in the past months, but stabilize in January 2012. However they were both 5 percent higher than in January 2011. Overall, recent declines in non-cereal food prices have contributed to a reduced inflation.

The Government has implemented a series of policy measures in effort to stabilize most of the domestic cereal prices and markets. However, the price of Japonica rice, consumed by the higher-income groups of the population, has been increasing, reflecting sustained demand associated with growth of incomes. Similarly, prices of Indica rice, the staple for the majority of the population, has been rising since December 2010 and in October 2011 it was 22 percent above its level a year before.

The latest official data indicate that the year-on-year consumer price inflation (CPI) increased slightly to 4.5 percent in January 2012 from 4.1 percent in December 2011.





GIEWS Country Brief

China (Mainland)

Reference Date: 22-December-2011

FOOD SECURITY SNAPSHOT

- Record 2011 cereal harvest estimated despite a prolonged dry conditions in parts of the country during the year
- Cereal prices continue to rise

Record 2011 cereal harvest estimated despite a prolonged dry conditions in parts of the country during the year

In spite of the exceptionally dry weather conditions in mid-year affecting some parts of the country, total cereal production has been estimated at a record level of 512.2 million tonnes including paddy or 448.2 million tonnes including milled rice. This increase was supported by the Government's effort to provide irrigation and other inputs/resources to drought0affected farmers.

The harvest of the 2011 secondary spring wheat crop was completed in August and the winter wheat crop was gathered earlier this year. The 2011 aggregate wheat output is estimated at a record level of 116.8 million tonnes, indicating a slight increase over the previous year's bumper output.

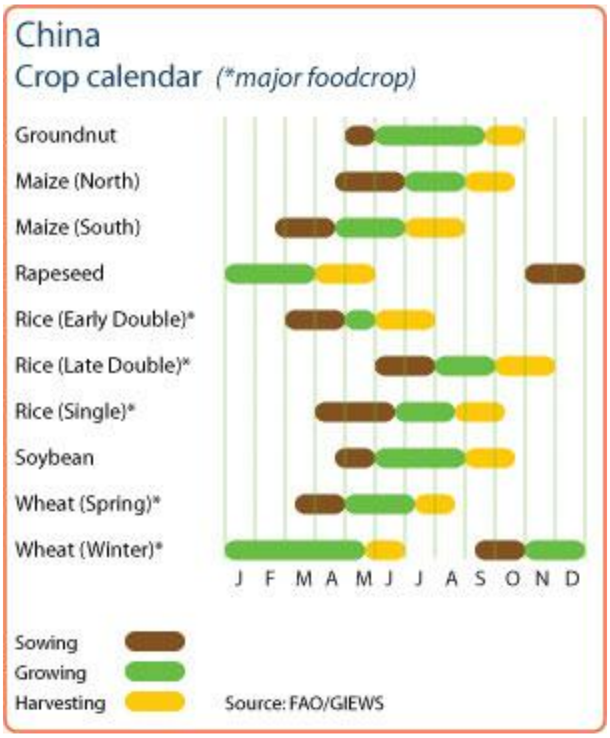
Harvesting of the 2011 maize crop began in April in the south and continued until mid0October in the north. The 2011 maize output has reached a new level of 184.5 million tonnes, 4.1 percent over the 2010 record harvest.

Harvesting of the rice crop was completed in November. Reflecting increase in paddy plantings and high yields, the aggregate rice harvest (in paddy terms) has been upgraded to 200.2 million tonnes, indicating a 3 percent increase from the harvest of a year before. The total paddy production has experienced an upward trend over the last ten years, consistent with China's high self-sufficiency target and government support to the cereal sector. The production augmentation is also seen as partly a response to the higher procurement prices. Some liberalization of the market has also supported the increase in cereal production.

Despite the significant improvement in the cereal production over the past few years, China (Mainland), the country is expected to import about 4.5 million tonnes of maize during 2012 or 3.2 million tonnes more than in 2011. This high imports level is in response to China's growing demand for feed and the increasingly high domestic maize price. Similarly, the total cereal imports, including barley, maize, wheat and rice, during the 2010/11 marketing year (July/June) for the Mainland China are estimated at 4.8 million tonnes, a 13.8 percent lower than a year earlier. The total cereal imports for the 2011/12 marketing year are forecast to reach a new record level at 9.2 million tonnes.

Cereal prices continue to rise

Prices of rice and wheat flour have been rising steadily in the past months, and in November 2011 were 12 and 14 percent higher than November 2010, respectively. Price for maize declined slightly in



China
Cereal production

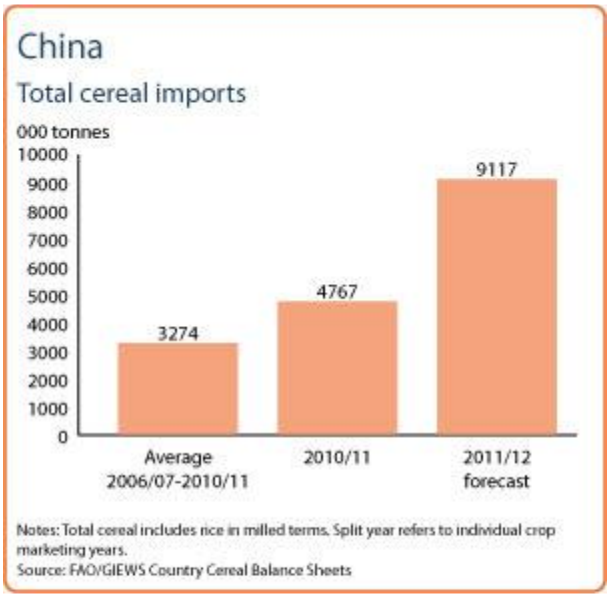
	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Rice (paddy)	190 103	195 761	201 500	3
Maize	162 208	177 245	184 500	4
Wheat	112 103	115 180	116 790	1
Others	10 053	9 291	9 355	1
Total	474 466	497 477	512 145	3

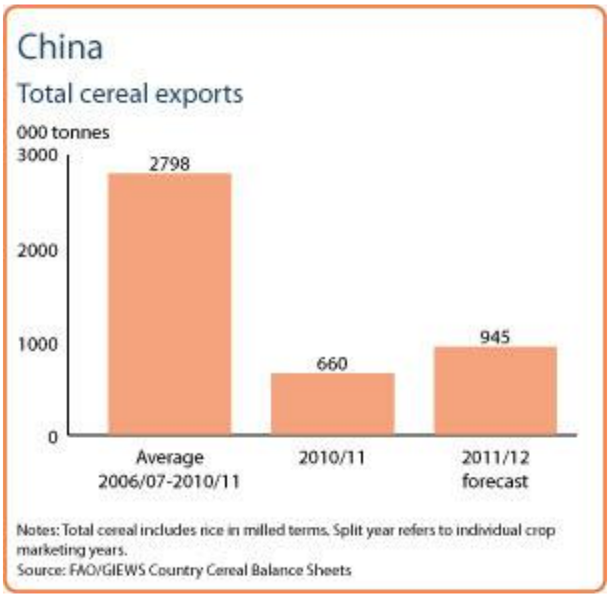
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

November, following the completion of a record harvest. Overall, recent declines in non-cereal food prices have contributed to a reduced inflation, which are given a nearly one-third weight in China's consumer price inflation calculation.

The Government has implemented a series of policy measures in effort to stabilize most of the domestic cereal prices and markets. However, the price of Japonica rice, consumed by the higher-income groups of the population, has been increasing, reflecting sustained demand associated with growth of incomes. Similarly, prices of Indica rice, the staple for the majority of the population, has been rising since December 2010 and in October 2011 it was 22 percent above its level a year before.

The latest official data indicate that the year-on-year consumer price inflation (CPI) decreased to 4.2 % in November 2011 from 5.5 percent in October 2011. The inflation in November was the lowest since October last year.





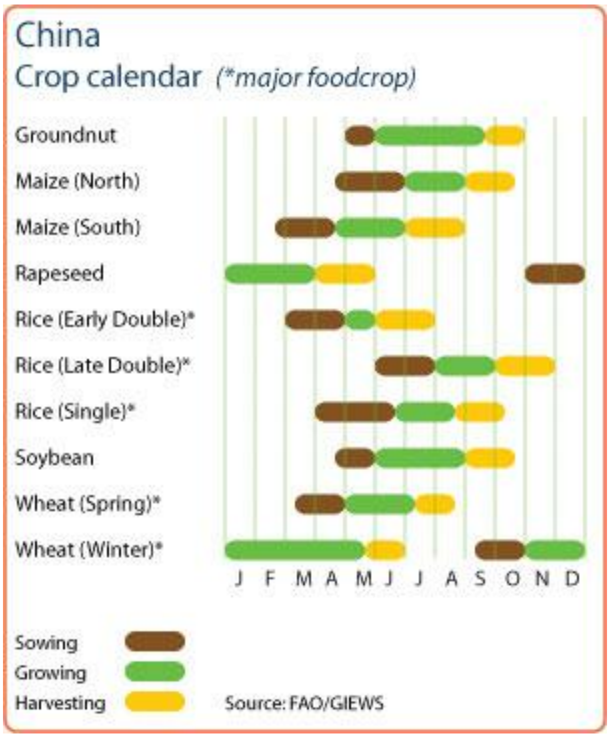
GIEWS Country Brief

China (Mainland)

Reference Date: 26-May-2011

FOOD SECURITY SNAPSHOT

- In spite of the drought conditions the current winter wheat harvest is estimated at 114 million tonnes just shy of the record levels in 2009 and in 2010
- A record cereal harvest was obtained in 2010 in spite of floods in parts of the country
- Basic food prices continue to rise



The 2011 winter wheat crop is estimated at 114 million tonnes, 1 percent below 2010 level

In the Mainland China the persistent drought situation has not improved a great deal, however, given the reported massive efforts from the Government to provide irrigation and other inputs/resources to farmers the drought effect is expected to be mitigated somewhat. The estimate of the harvest at 114 million tonnes is slightly below last two years' good crop. In the North China Plain, the main wheat growing area of the country, received some precipitation, either through cloud seeding or naturally, and experienced increased efforts on irrigation, easing drought conditions prevailing since the planting. The dry conditions reportedly have also lead to much higher incidence of pests and diseases on wheat crop.

China

Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Rice (paddy)	190 750	199 000	204 000	3
Maize	161 259	172 500	170 000	-1
Wheat	112 087	115 100	114 500	-1
Others	6 914	6 712	6 755	1
Total	474 257	496 012	497 855	0

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Record 2010 cereal outputs gathered in spite of localized flood losses

In spite of the floods last year from May to August in several areas of the country, the total cereal production has been estimated at a record level of 496 million tonnes including paddy or 433 million tonnes including milled rice. The floods affected over 12 million people and damaged crops on 13 million hectares in areas including Guangdong, Guangxi, Fujian, Sichuan, Yunnan, Guizhou, Chongqing, Hubei, Hunan, Jiangxi, Anhui, Shaanxi and Gansu.

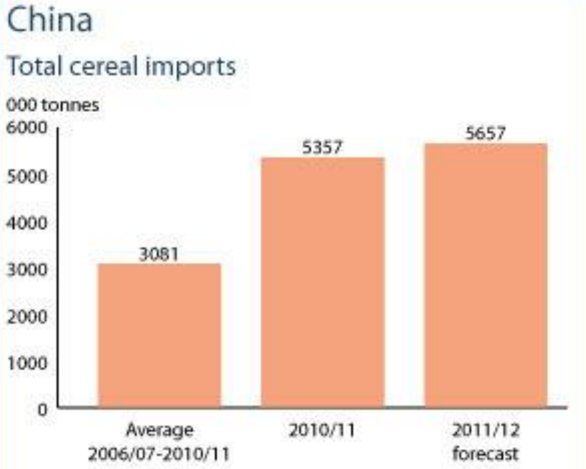
The production augmentation is partially seen a response to the higher procurement prices. The Minimum Purchase Prices (MPP) for all wheat in 2010 were increased by CNY 60/tonne from the previous year to CNY 1 800/tonne (USD 264) for white wheat and CNY 1 720/tonne (USD 252.6) for red and mixed wheat. For rice paddy (unmilled), the MPP for 2010 crop was CNY 1 860/tonne (USD 272.8) for early season Indica rice, CNY 1 940/tonne (USD 284.5) for intermediate season Indica rice and CNY 2 100/tonne (USD 308) for late season Japonica rice. These are higher than in the previous year by CNY 60 for early Indica, CNY 100 for middle and late Indica, and CNY 200 for Japonica.

Some liberalization of the market has also supported the increase in cereal production. Different from the previous years, when the Government was the sole buyer of wheat, many private enterprises involved in wheat processing and trading are now allowed to participate in purchasing of wheat at the official minimum purchase prices. This is expected to make the wheat market more competitive and favourable to farmers.

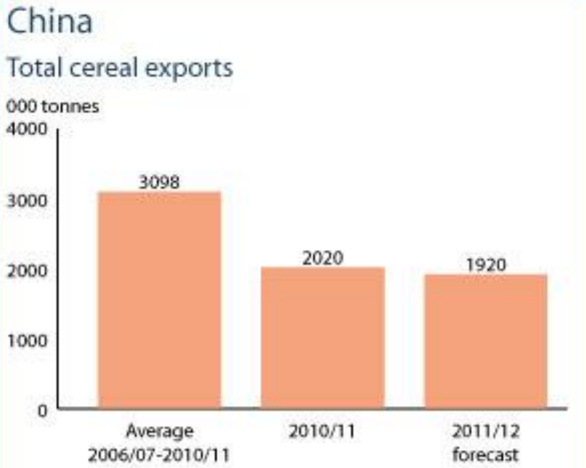
Given the significant improvement in the cereal production over the past few years China (Mainland) has become virtually self sufficient in net trade terms. The total cereal imports in 2011/12 ((July/June) comprising of barley, maize, wheat and rice, are forecast at 5.7 million tonnes, showing a slight increase over the estimated imports during 2010/11.

Cereal prices continue to rise

Faced with soaring international food and fuel prices and inflationary pressures since 2006, China has implemented a series of policy measures and has effectively stabilized most of the domestic cereal prices and markets. However, the price of Japonica rice, consumed by the higher-income groups of the population, has been increasing reflecting sustained demand associated with growth of incomes. On the other hand, prices of Indica rice prices, the staple for the majority of the population, were more stable. Uncertain prospects for the current winter wheat harvest, combined with rising international price of wheat, have resulted in rising prices of the commodity in the domestic market in past several months.



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Source: National Bureau of Statistics of China

GIEWS Country Brief

China (Mainland)

Reference Date: 1-April-2011

FOOD SECURITY SNAPSHOT

- Outlook for the current winter wheat crop is uncertain but improved from late February
- A record cereal harvest was obtained in 2010 in spite of floods in parts of the country
- Basic food prices rising

Outlook for 2011 winter wheat crop remains uncertain but prospects improving with easing of the drought situation

The prospects for the winter wheat crop planted in October 2010 have improved since FAO's earlier assessment of the situation in early February. In the North China Plain, the main wheat growing area of the country, received some precipitation, either through cloud seeding or naturally, and experienced increased efforts on irrigation, easing drought conditions prevailing since the planting. The dry conditions reportedly have also lead to much higher incidence of pests and diseases on wheat crop. However, precise damage estimates are not yet known. Thus, the prospects for the harvest from June remain uncertain at this time of the season.

Record 2010 cereal outputs gathered in spite of localized flood losses

In spite of the floods last year from May to August in several areas of the country, the total cereal production has been estimated at a record level of 496 million tonnes including paddy or 433 million tonnes including milled rice. The floods affected over 12 million people and damaged crops on 13 million hectares in areas including Guangdong, Guangxi, Fujian, Sichuan, Yunnan, Guizhou, Chongqing, Hubei, Hunan, Jiangxi, Anhui, Shaanxi and Gansu.

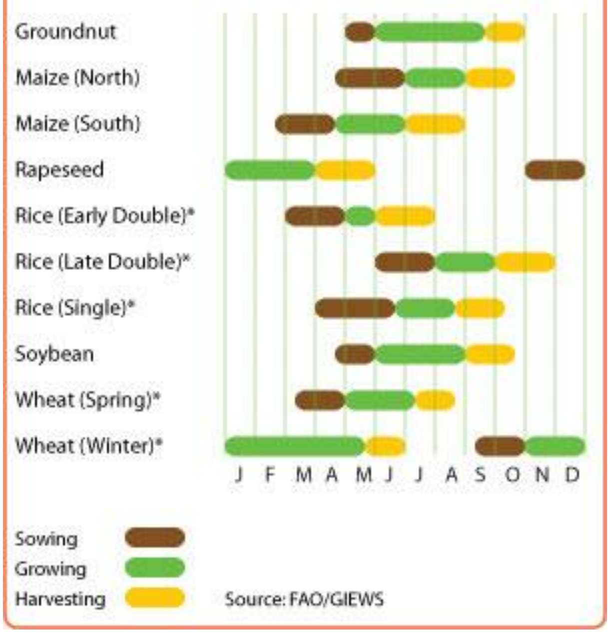
The production augmentation is partially seen a response to the higher procurement prices. The Minimum Purchase Prices (MPP) for all wheat in 2010 were increased by CNY 60/tonne from the previous year to CNY 1 800/tonne (USD 264) for white wheat and CNY 1 720/tonne (USD 252.6) for red and mixed wheat. For rice paddy (unmilled), the MPP for 2010 crop was CNY 1 860/tonne (USD 272.8) for early season Indica rice, CNY 1 940/tonne (USD 284.5) for intermediate season Indica rice and CNY 2 100/tonne (USD 308) for late season Japonica rice. These are higher than in the previous year by CNY 60 for early Indica, CNY 100 for middle and late Indica, and CNY 200 for Japonica.

Some liberalization of the market has also supported the increase in cereal production. Different from the previous years, when the Government was the sole buyer of wheat, many private enterprises involved in wheat processing and trading are now allowed to participate in purchasing of wheat at the official minimum purchase prices. This is expected to make the wheat market more competitive and favourable to farmers.

Given the significant improvement in the cereal production over the past few years China (Mainland) has become virtually self sufficient in

China

Crop calendar *(*major foodcrop)*



Source: FAO/GIEWS

China

Cereal production

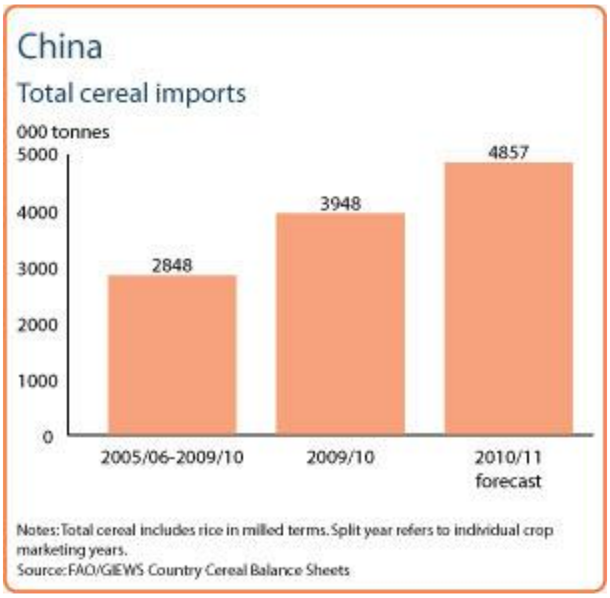
	2005-2009 average	2009	2010 estimate	change 2010/2009
	000 tonnes			percent
Rice (paddy)	187069	195103	199000	2
Maize	154634	163974	172500	5
Wheat	108556	115115	115100	0
Others	10529	9175	9412	3
Total	460788	483367	496012	3

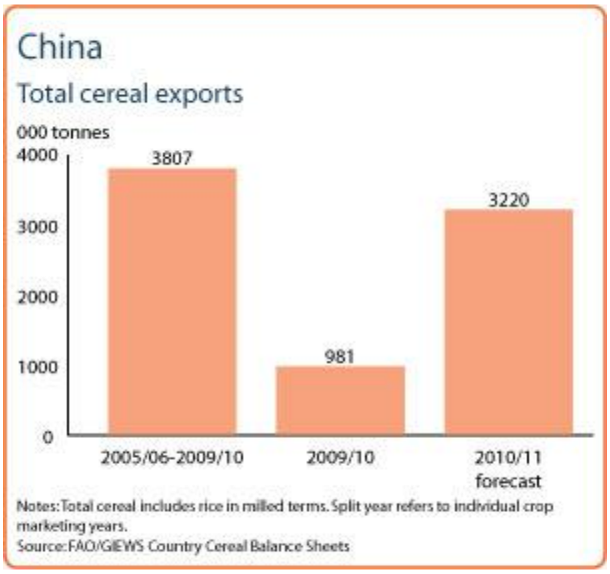
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

net trade terms. The net import position in 2011 would, however, be decided by the final outcome of the current wheat harvest.

Cereal prices rising

Faced with soaring international food and fuel prices and inflationary pressures since 2006, China has implemented a series of policy measures and has effectively stabilized most of the domestic cereal prices and markets. However, the price of Japonica rice, consumed by the higher-income groups of the population, has been increasing reflecting sustained demand associated with growth of incomes. On the other hand, prices of Indica rice prices, the staple for the majority of the population, were more stable. Uncertain prospects for the current winter wheat harvest, combined with rising international price of wheat, have resulted in rising prices of the commodity in the domestic market in past several months.





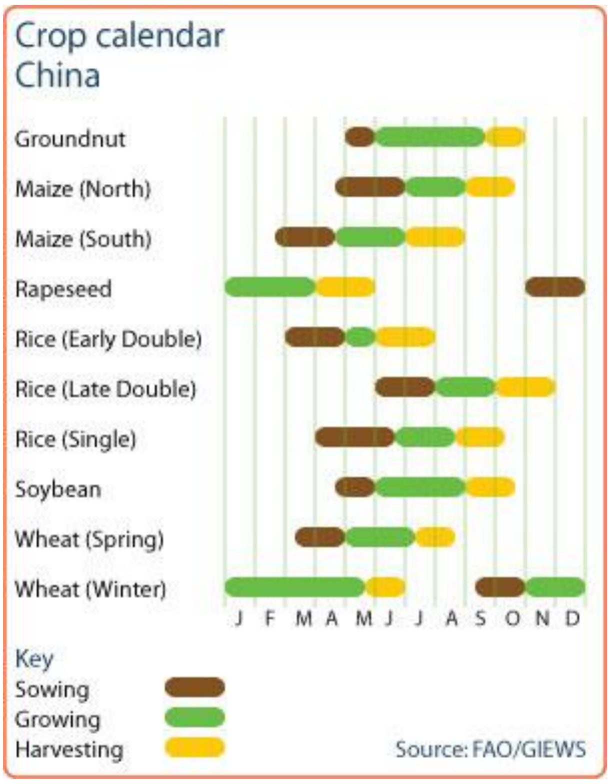
GIEWS Country Brief

China (Mainland)

Reference Date: 28-August-2010

FOOD SECURITY SNAPSHOT

- Floods and landslide displaced millions of population and caused localized crop damage
- A bumper 2010 wheat crop gathered and record cereal output expected
- Increased Government support prices for wheat and rice
- Overall cereal supply situation satisfactory and basic food prices stable



Floods and landslide displaced 12 millions and caused serious localized crop damage

From May to August 2010, several areas of China experienced floods that overall are rated as the worst in a decade. Over 12 million people have been displaced and more have been adversely affected by the floods. Severe crop losses are reported at local level and in aggregate 13 million hectares of farmlands have been damaged. The most seriously affected areas include Guangdong, Guangxi, Fujian, Sichuan, Yunnan, Guizhou, Chongqing, Hubei, Hunan, Jiangxi, Anhui, Shaanxi and Gansu.

On 8 August 2010, a massive mudslide hit the mountainous Zhouqu county of Gannan Tibetan Autonomous Prefecture. As of 27 August 2010, at least 1 456 were killed and 309 are listed as missing. Destruction of large numbers of houses and basic infrastructures is also reported.

Record 2010 cereal and livestock outputs expected in spite of localized losses

Harvesting of the 2010 winter wheat crop, which accounts for about 95 percent of China's annual wheat production, was gathered in June, while harvest of the 2010 secondary spring wheat crop has just been completed.

The winter wheat output is estimated slightly higher than last year's bumper crop, while the spring crop is anticipated to be slightly below the record level of last year due to extremely low temperature at planting time that resulted in the reduction of area sowed in northeast China, the main growing region. In aggregate, the 2010 wheat output is put at about 114 million tonnes, close to the record level of the previous year.

Harvesting of 2010 maize crop was completed in southern areas in August, but is still ongoing in northern parts. The 2010 maize output is forecast at a record level of 166 million tonnes reflecting higher yields and plantings, in response to strong demand from the livestock sector.

Harvesting of the 2010 early rice crop, a small crop accounting for less than 20 percent of total annual paddy output, was completed in July, and production is officially estimated at 31.3 million tonnes, 6.1 percent below the record level of last year. Prospects for the intermediate (single) and late rice crops are reported to be developing under generally favourable growing conditions. The aggregate paddy rice

China

Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Rice (paddy)	187068	195100	196639	1
Maize	154633	163970	166000	1
Wheat	108557	115121	114000	-1
Others	10529	9175	9412	3
Total	460788	483366	486051	1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

output is 2010 is tentatively forecast at a record 196 million tonnes.

During the first half of the year, total meat output (including pork, beef, mutton, and poultry) is officially reported at 37.13 million tonnes, 3.5 percent over the record in the previous year.

Higher support prices for cereals and trade opened in current season

The Minimum Purchase Prices (MPP) for all wheat in 2010 increased by CNY 60/tonne (USD 8.8) from the previous year. The new MPP is CNY 1 800/tonne (USD 264) for white wheat, CNY 1 720/tonne (USD 252.6) for red and mixed wheat. The purchase period at these prices is from 21 May to 30 September 2010.

For rice paddy (unmilled), the MPP for 2010 crop is CNY 1 860/tonne (USD 272.8) for early season Indica rice, CNY 1 940/tonne (USD 284.5) for intermediate season Indica rice and CNY 2 100/tonne (USD 308) for late season Japonica rice. They are respectively higher than in the previous year by CNY 60/tonne (USD 8.8) for early Indica, CNY 100/tonne (USD 14.7) for middle and late Indica, and CNY 200/tonne (USD 29.4) for Japonica.

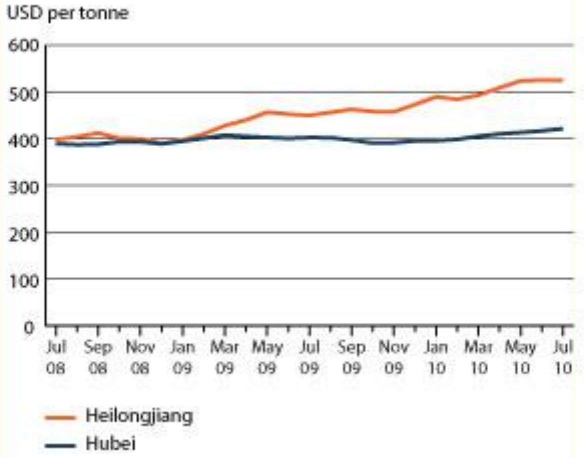
Different from the previous years, when the Government was the sole buyer of wheat, many private enterprises involved in wheat processing and trading are allowed to participate in purchasing of wheat this year at the official minimum purchase prices. This is expected to make the wheat market more competitive and favourable to farmers.

Overall cereal supply situation satisfactory and cereal prices remain stable

Despite the localized crop losses to floods and food difficulties experience by the affected population, the overall cereal supply situation in the country remains satisfactory. The 2010 aggregate cereal output is forecast above the previous year's record production, while carryover stocks of rice, wheat and maize from the 2009/10 season are estimated to be much higher than in recent years.

Faced with soaring international food and fuel prices and inflationary pressures since 2006, China has implemented a series of policy measures and has effectively stabilized domestic cereal prices and markets. By July, Indica rice prices, the staple for the majority of the population, were about the same level than a year ago. However, the price of Japonica rice, consumed by the higher-income groups of the population, has been increasing reflecting sustained demand associated with growth of incomes.

China
Selected wholesale rice prices



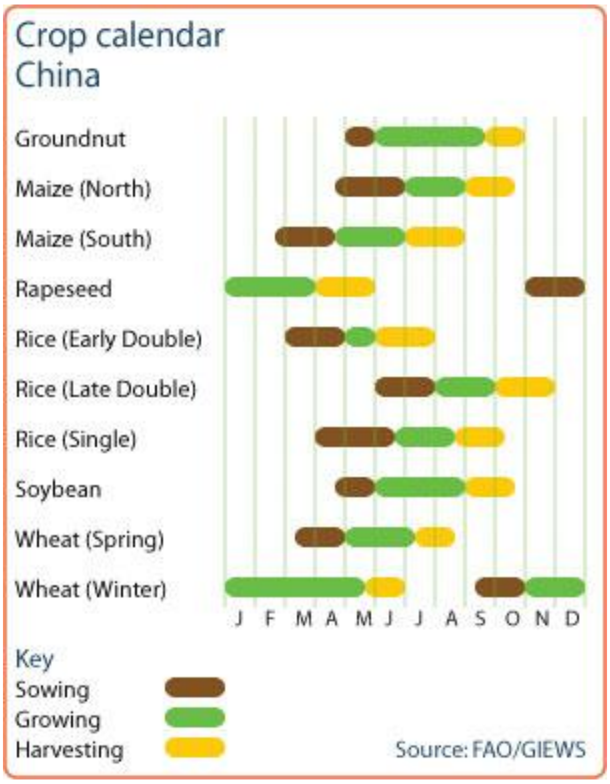
Source: Private Company

GIEWS Country Brief

China (Mainland)

Reference Date: 10-June-2010

FOOD SECURITY SNAPSHOT
- A good 2010 winter wheat crop being harvested
- Increased government support prices for wheat and rice production
- Overall cereal supply situation satisfactory and basic food prices stable



A bumper harvest of the 2010 winter wheat is expected

Harvesting of the 2010 winter wheat crop, which accounts for about 95 percent of China's annual wheat production, is well advanced. The winter wheat output is forecast to be slightly higher than last year's bumper crop, despite a series of weather-related problems, including heavy drought in southwestern China since last September until March 2010 and persistent cold weather during the early stage of the season in north and east China.

The good crop is a result of the larger area and improvement of weather conditions in the late stage of crop development. The area planted is reportedly increased by 130 000 hectares above the record in the previous year, reflecting the strong government support with direct subsidies and increased government purchase prices.

Higher support prices for cereals and trade opened in current season

The Miminum purchase prices (MPP) for all wheat increased by CNY 60 (or USD 8.8) per tonne from the previous year. The new MPP in 2010 is CNY 1800 per tonne for white wheat (USD 264), CNY 1720 per tonne for red wheat (USD 252.6), and mixed wheat. The purchase period for these governemnt price is from 21 May to 30 September 2010.

For rice paddy (unmilled), the MPP for 2010 crop is CNY 1860 per tonne (USD 272.8) for early season Indica rice, CNY 1940 per tonne (USD 284.5) for intermediate season Indica rice and CNY 2100 per tonne (USD 308) for late season Japonica rice. They are respectively higher than in the previous year by CNY 60 (or USD 8.8) per tonne for early Indica, CNY 100 (or USD 14.7) per tonne for middle and late Indica, and CNY 200 per tonne (or USD 29.4) for Japonica.

Different from the previous years, when the Government was the sole buyer of wheat, many private enterprises involved in wheat processing and trading are allowed to participate in purchasing of wheat this year at the official minimum purchase prices. This is expected to make the wheat market more competitive and favourable to farmers.

China

Cereal production

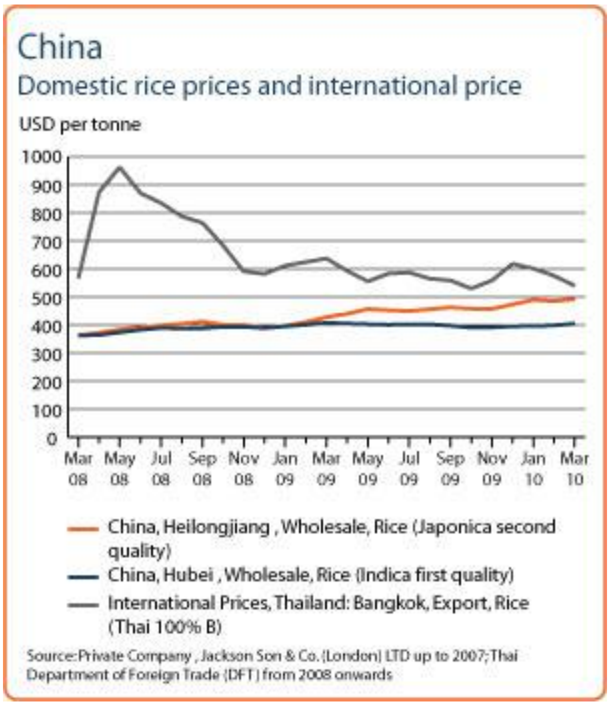
	2004-2008 average	2008	2009 estimate	change 2009/2008
	000 tonnes			percent
Rice (paddy)	183866	191897	195800	2
Maize	147897	165917	158000	-5
Wheat	103925	112463	114950	2
Others	10720	9933	9156	-8
Total	446408	480210	477906	0

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Overall cereal supply situation satisfactory and grain prices remain stable

The overall cereal supply situation in China is satisfactory. The 2009 aggregate cereal output was estimated virtually unchanged from the previous year's good crop, which reflected several consecutive years of growth. Ending stocks of rice, wheat and maize are estimated to be much higher than those in recent years. From 2004 to 2009, the ratio of ending stock to domestic utilization has been estimated to have increased from 45 percent to 54.5 percent for rice and 48 percent to 76 percent for wheat. These ratios in China, compared to the world average (excluding China), are much higher.

Faced with soaring international food and fuel prices and inflationary pressures since 2006, China has implemented a series of policy measures and has effectively stabilized domestic grain prices and markets. The major factor behind this stabilization has been China's long term grain production support policies which boosted grain output. Restricting grain export measures and building grain reserve also effectively isolated the domestic market from international trends during the soaring food prices crisis in 2008.



GIEWS Country Brief

China (Mainland)

Reference Date: 8-April-2010

FOOD SECURITY SNAPSHOT

- Severe drought threatens food security in southwestern China
- Outlook of 2010 winter wheat crop is favourable
- Overall cereal supply situation satisfactory and basic food prices stable
- Magnitude earthquake hits Qinghai province

Severe and prolonged drought threatens food security in southwestern China

Parts of southwestern China are suffering from the worst drought in several decades since last September is adversely affecting huge areas of the 2010 winter wheat and oilseeds crops and leaving millions of people water and food shortage Up to March 21, it was estimated that some 50 millions of people are affected and 16 millions of people face drinking water shortages. The worst affected areas include the provinces of Yunnan, Guizhou, Guangxi, Sichuan, as well as the city of Chongqing. The national grain bureau has mobilized 1.42 million tonnes of grain as emergency stocks to the affected region.
At national level, however, the impact of the drought on the 2010 wheat production will be very limited. The area affected is about 3.7 percent of the normal total area planted and the share of the affected production is about 1.7 percent.

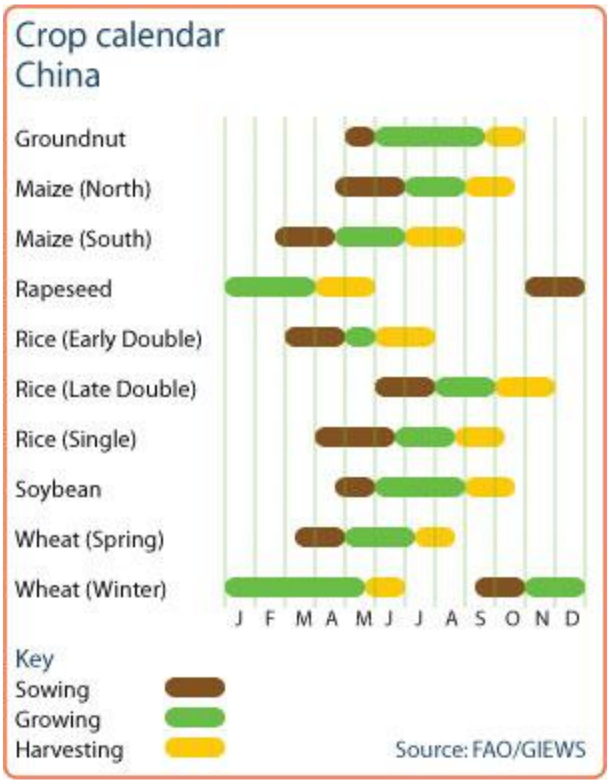
Outlook for the 2010 winter wheat is generally favourable

The outlook is generally favourable for the winter wheat crop The winter wheat crop, which accounts for about 95 percent of annual wheat production, is at the late stage of development. The area planted is preliminarily estimated unchanged from the record in the previous year, reflecting the strong government support with direct subsidies and increased minimum purchase prices for wheat by 60 Yuan (or USD 8.8) per tonne for white wheat, red wheat, and mixed wheat in 2010 from the previous year and for rice increased by 60 Yuan (or USD 8.8) per tonne for early Indica, 100 Yuan (or USD 14.7) per tonne for middle and late Indica, and 200 Yuan per tonne (or USD 29.4) for Japonica.

Overall cereal supply situation satisfactory and grain prices remain stable

The overall cereal supply situation in China is satisfactory. The 2009 aggregate cereal output was estimated virtually unchanged from last year's good crop, which reflected five consecutive years of growth. Ending stocks of rice, wheat and maize are estimated to be much higher than those in recent years. From 2004 to 2009, the ratio of ending stock to domestic utilization has been estimated to have increased from 45 percent to 54.5 percent for rice and 48 percent to 76 percent for wheat. These ratios in China are much higher than those of the world average (excluding China).

Faced with soaring international food and fuel prices and inflationary pressures since 2006, China has implemented a series of policy measures and has effectively stabilized domestic grain prices and



China

Cereal production

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markets. The major factor behind this stabilization has been China's long term grain production support policies which boosted grain output. Restricting grain export measures and building grain reserve also effectively isolated the domestic market from international trends during the soaring food prices crisis in 2008.

The retail price of Indica rice, the staple food for the poor, was quoted at 2.849 Chinese Yuan/kg in March 2010, almost unchanged from that in the previous year and 7.9 percent higher compared to that in March 2008.

The retail price of Japonica rice, mostly consumed by wealthy people, has been increasing in last two years (from 2.575 Yuan/kg in March 2008 to 3.365 Yuan/kg in March 2010), reflecting strong demand from the middle- class and rich people.

7.1 Magnitude earthquake hits Qinghai province and affecting food security of local residents

An earthquake measuring 7.1 on the Richter scale hit northwest China's Qinghai province on 14 April 2010. Some 2 000 people has been reportedly killed and some 12 000 people injured. The area of the quake is the home of herders and Tiberan monasteries. Some 40 000 animals (7.6 percent of total animals in the area) were reportedly lost.

China

Domestic rice prices and international price

Source: Private Company , Jackson Son & Co. (London) LTD up to 2007; Thai Department of Foreign Trade (DFT) from 2008 onwards

GIEWS Country Brief

China

Reference Date: 10-September-2009

FOOD SECURITY SNAPSHOT
- Favourable crop prospects for 2009, reflecting adequate growing conditions
- Overall cereal supply situation satisfactory and grain prices continue to be stabilized
- Governments' new trade policies to encourage exports
- Typhoon Morakot seriously affected crop and food production and supply and displaced millions in Taiwan and Southeast Mainland China

Record grain output in 2009 is forecast

In **China (Mainland),** the harvest of the 2009 secondary spring wheat crop was completed in August and output is estimated at record 6 million tonnes. Winter wheat, gathered earlier in the year, was reported a bumper crop despite a series of weather-related problems, including drought and widespread crop diseases in some major wheat-growing areas earlier this year. The 2009 aggregate wheat output is now estimated at a record 114.9 million tonnes, some 2.2 percent above the previous high set last year.

Harvesting of the 2009 maize crop was completed in southern areas in August, but is still ongoing in northern parts. The 2009 maize output is forecast at 165.5 million tonnes, virtually unchanged from the record level of last year.

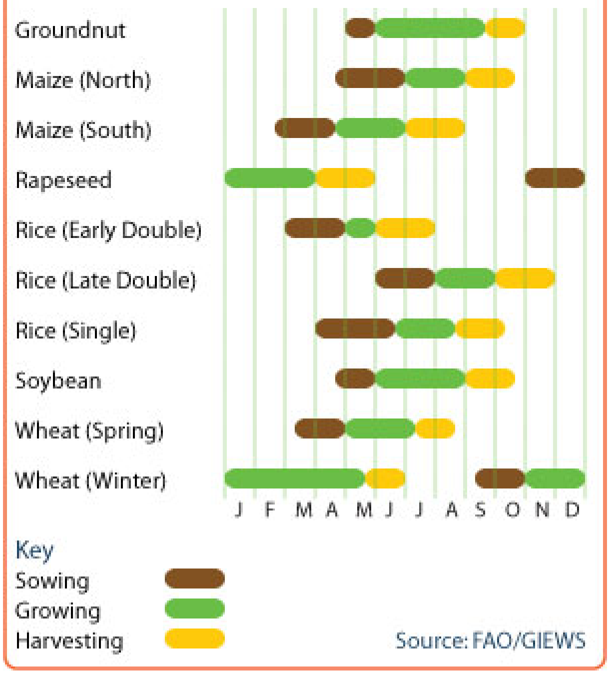
Harvesting of the 2009 early rice crop, a small crop accounting for less than 20 percent of total annual paddy output, was complete in July, and output is estimated at some 38 million tonnes, about 3.3 percent above the good crop of last year, reflecting increased area and high yields. The intermediate and late rice crops, planted in July, and due for harvest in November and December, are reported to be developing under generally favourable growing conditions. The aggregate paddy rice output in 2009 is tentatively forecast at 193 million tonnes, some 1 percent up from last year's record.

Overall cereal supply situation satisfactory and grain prices remain stable

The overall cereal supply situation in China is satisfactory. The 2009 total cereal output is expected to grow for the 6th consecutive year. Ending stocks of rice, wheat and maize are estimated to be much higher than those in recent years. From 2004 to 2009, the ratio of ending stock to domestic utilization has been estimated to have increased from 45 percent to 54.5 percent for rice and 48 percent to 76 percent for wheat. These ratios in China are much higher compared to those of the world average (excluding China).

Faced with soaring international food and fuel prices and inflationary pressures since 2006, China has implemented a series of policy measures and has effectively stabilized domestic grain prices and markets. The major factor attributed to this stabilization should be China's long term grain production support policies which boosted grain production. Restricting grain export measures and grain reserve measures also effectively isolated the domestic market from

Crop calendar
China



Cereal production and imports
China

Cereal production	2004-2008 average	2008	2009 forecast	change 2009/2008
	000 tonnes			percent
Maize	147943	165964	165547	-0.3%
Rice (milled)	127012	132518	134392	1.4%
Wheat	103925	112463	114950	2.2%
Other	10825	9952	9175	-7.8%
Total Cereals	389568	420897	424064	0.8%

Source: FAO/GIEWS Country Cereal Balance Sheets

international trends and brought domestic grain markets under control.

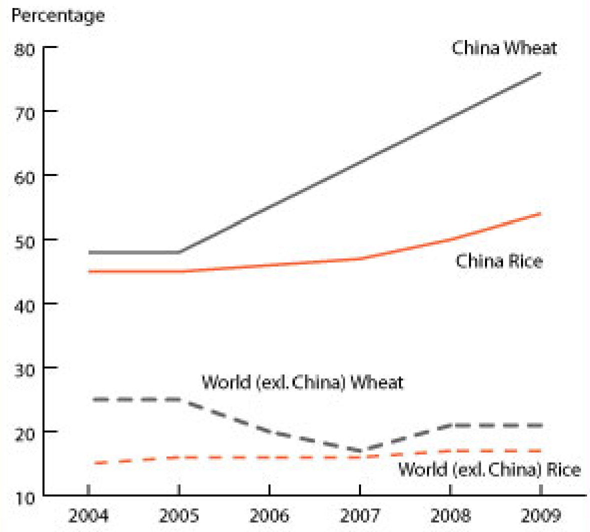
Governments' new trade policies to encourage exports

In view of the expected bumper crops and sufficient cereal supply in 2009/10, China has eliminated export taxes on some grains, including wheat (3 percent), rice (3 percent), and soybeans (5 percent), effective 1 July 2009. China also eliminated special export taxes on some fertilizers.

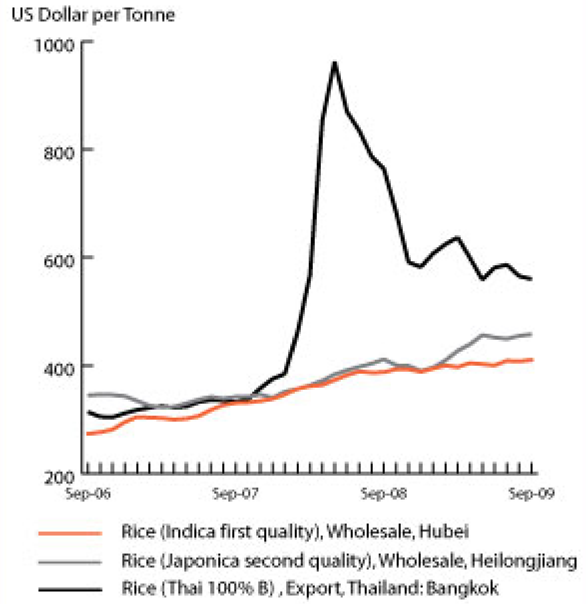
Typhoon Morakot seriously affected and displaced millions in Taiwan and Southeast Mainland China

The landfall and flooding during 6-11 August 2009 severely affected the Taiwan and the following provinces in China Mainland: Zhejiang, Fujian, Jiangsu, Anhui, Jiangxi, and Shanghai. Agriculture has been the hardest hit. On the mainland alone, more than 3.4 million hectares of farmlands have reportedly been damaged severely. Direct economic loses have been estimated at over USD 5.3 billion. In Taiwan, total agricultural losses have been reported at over 16.4 billion NT dollars (or USD 500 million).

Ratio of ending stocks to utilization in China and in the rest of the world



China - Domestic rice prices and international price



Source: Private Company ; Jackson Son and Co. (London) Ltd.