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## CHINA'S AGRICULTURAL FOREIGN TRADE FLOWS: TRENDS, CHALLENGES, AND OPPORTUNITIES

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## СІЛЬСЬКОГОСПОДАРСЬКІ ЗОВНІШНЬОТОРГОВЕЛЬНІ ПОТОКИ КИТАЮ: ТРЕНДИ, РИЗИКИ ТА МОЖЛИВОСТІ

**Formulation of the problem.** In 2023, China's foreign trade in agricultural products has achieved remarkable results. China's total import and export of agricultural products was US\$333.035 billion, of which exports were US\$98.929 billion and imports were US\$234.106 billion. The development of China's agricultural exports has effectively promoted the in-depth extension and diversification of the agricultural value chain, opening up new space for promoting high-quality agricultural development. In 2023, China's exports of vegetables and products were US\$13.97 billion, an increase of 9.6 % over the same period last year; exports of fruits and products were US\$7.08 billion, an increase of 2.2 % over the same period last year; exports of feed were US\$3.95 billion, an increase of US\$3.95 billion compared with the same period last year. The export value of cereal products increased by 1 % over the same period, reaching US\$2.87 billion; the export value of nuts and products, spices and alcohol increased by 7.7 %, 29.7 % and 38.5 % respectively compared with the same period last year [8].

At the same time, China has canceled non-tariff measures on agricultural products and export subsidies for all agricultural products, making China one of the countries with the most open agricultural market. Quality promotes development, and the scale and quality of agriculture going global continue to improve. But when it comes to imports, China is still one of the largest importing countries in the world. This is due to China's small cultivated land area, large population base, and lack of intensification, technology, and mechanization of the tangible agricultural industry. For agricultural products with high economic added value, China is still very dependent on imports and is subject to various trade barriers and tariffs in the world. Policy restrictions and dependence on imports are very obvious. However, through the analysis of trends in the two five-year plans from 2014 to 2022, we have also seen that the Chinese government has been committed to improving the relationship between the import and export of agricultural products and China's contradictions, promoting the smooth operation of the economy, and has achieved very good results.

In 2023, China's top ten import source countries by total agricultural imports are Brazil, the United States, Thailand, Australia, Canada, New Zealand, Indonesia, Russia, Vietnam, and France. The top ten countries for Chinese export are Hong Kong, Japan, the United States, South Korea, Vietnam, Malaysia,

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Thailand, Indonesia, the United Kingdom, and the Netherlands. These countries have a decisive impact on China's agricultural import and export policies and require the Chinese government and agricultural finance departments to actively Understand national policies and conduct trade negotiations and cooperation. Shandong, Henan, Sichuan, Hubei and Guangdong are the top five provinces in China in terms of total output value of agriculture, forestry, animal husbandry and fishery. They are major agricultural provinces and the most important provinces in the development of grain, cash crops, animal husbandry and fishery in China. In 2023, the top 10 provinces in China's agricultural exports are Shandong, Guangdong, Fujian, Zhejiang, Liaoning, Jiangsu, Hubei, Hunan, Shanghai, and Henan. The formulation and implementation of short-term, medium-term, and long-term agricultural plans and industrial structure adjustment policies, Policies must be designed around these provinces with the largest agricultural exports. Finally, through data analysis, trend analysis of China's agricultural import and export trade can be conducted.

**Analysis of recent research and publications.** The conceptual and analytical backgrounds of rural agricultural development are highlighted in the papers of W. Haggag, J. Harriss, I. Lishchynskyi, M. Lyzun, V. Kuryliak. Different aspects of Chinese agricultural foreign trade and international competitiveness are revealed by H. Bingchuan, X. Zhuoyan, L. Yuee, L. Congxi, L. Juan, G. Tiemei, and others. However, some issues need more detailed consideration. Particularly post-Covid dynamics require more precise attention in the context of new geopolitical realities.

**Setting objectives.** Analysis of China's agricultural import and export in the context of global geopolitical transformations and identification of trends, challenges, and opportunities for the state's agricultural policy based on this analysis.

**Presentation of the main research material.** In recent years, China has actively and steadily made use of the international agricultural product market and agricultural resources to carry out long-term strategic layout, increase research and development and cooperation in key core agricultural technologies, and promote high-level agricultural development on the basis of optimizing scientific and technological innovation in agricultural and rural areas. From the perspective of agricultural import and export levels, China's import trend shows a gradually balancing and decreasing trend [1; 10]. It is more adaptable to various domestic and foreign economic, natural resource, diplomatic, cultural and other influencing factors, which greatly avoids long-term dependence on imports of some agricultural products. Chinese import is also affected by other countries' control of agricultural markets and tariffs. Through mid-term and long-term agricultural plans, China has also actively adhered to the policy of going global, opening up, and promoting cooperation in agricultural trade, slowly increasing breakthroughs in key and core agricultural technologies, and improving the working system between "agriculture, rural areas, and farmers" mechanism [9]. Effectively introduce high-quality foreign agricultural resources, fully absorb and integrate international leading agricultural technology and management concepts, and promote the export of high value-added and cost-effective agricultural products. Exports show an increasing trend year by year.

In 2023, China's total import and export of agricultural products was US\$3330.35 billion, down 0.4 % from the same period last year, accounting for 5.6 % of China's total foreign trade import and export. Among them: exports were US\$989.29 billion, an increase of 0.7 % over the same period last year, accounting for 2.9 % of China's total foreign trade exports; imports were US\$2341.06 billion, a decrease of 0.8 % compared with the same period last year, accounting for 9.2 % of China's total foreign trade imports (Fig. 1) [8].

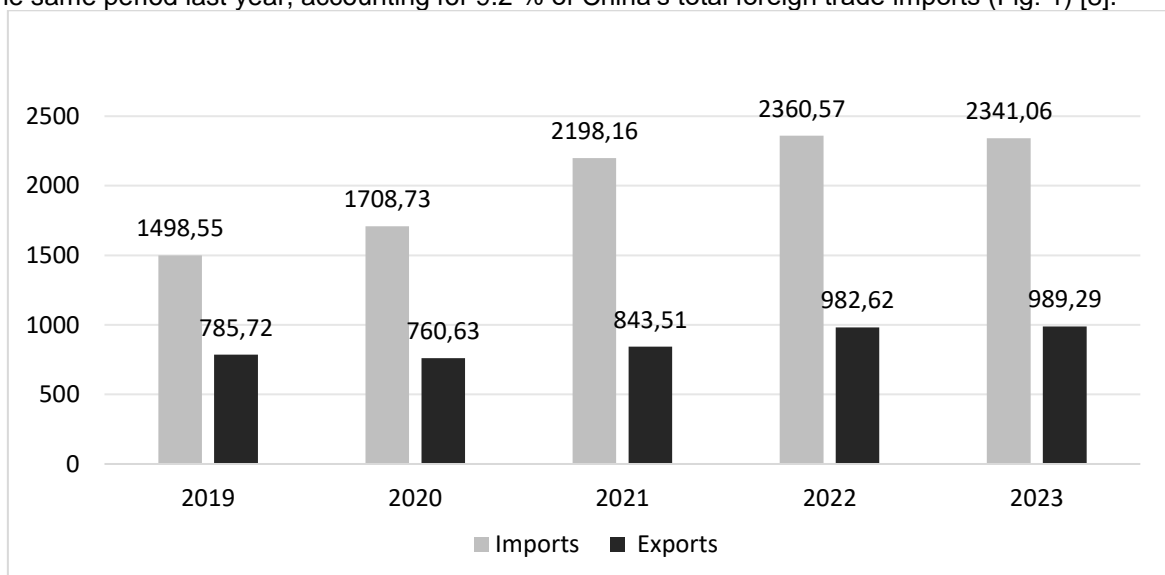


Fig. 1. China's import and export volume of agricultural products in the same period in the past five years, USD billion

Source: National Bureau of Statistics of China

In 2023, China's total imports of agricultural products will be US\$2341.06 billion, of which the total imports from the top ten import source country account for 72.3 % of the total imports of agricultural products. Ranking first is Brazil, with an import volume of US\$585.8 billion. It is China's largest source of imports of agricultural products, an increase of 11.7 % over the same period last year, accounting for 25 % of the total imports of agricultural products. The second-ranked source country of imported agricultural products is the United States, with an import value of US\$328.9 billion, a decrease of 21.8 % from the same period last year, accounting for 14.1 % of the total agricultural product imports. Ranking third is Thailand, with imports of US\$131.6 billion, an increase of 4.4 % over the same period last year, accounting for 5.6 % of total agricultural product imports (Fig. 2) [8].

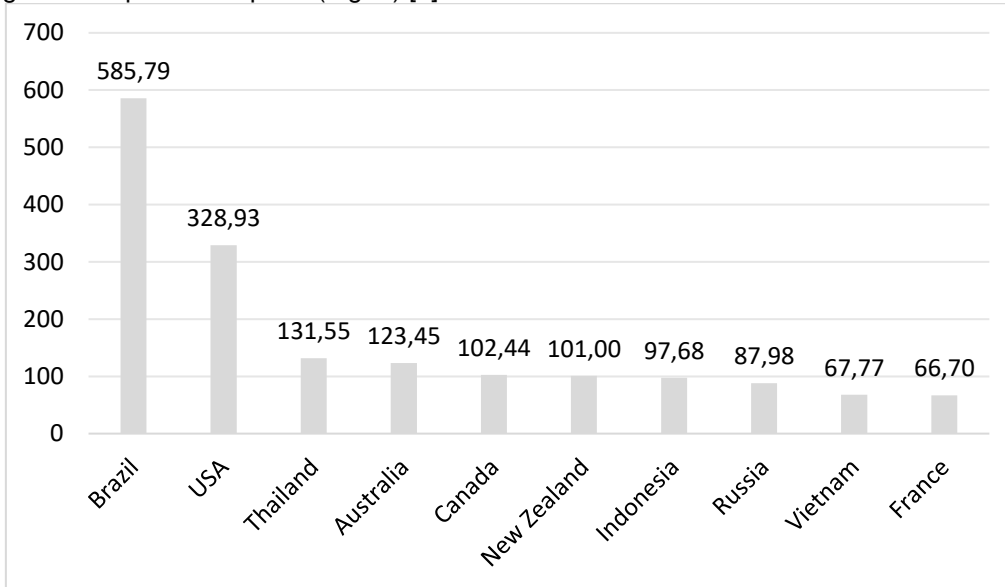


Fig. 2. Top 10 agricultural importing partners of China in 2023, USD billion  
 Source: National Bureau of Statistics of China

In 2023, China's agricultural exports will be worth 98.929 billion yuan, of which the total exports of the top ten provinces account for 62 % of the total agricultural exports. Hong Kong ranked first, with exports reaching US\$109.8 billion, down 3.3 % from the same period last year, accounting for 11.1 % of total agricultural exports (Fig. 3). Japan and the United States ranked second and third respectively. Among them, the export volume of agricultural products to Japan was US\$101.6 billion, down 4.2 % from the same period last year, accounting for 10.3 % of the total exports of agricultural products. The export volume of agricultural products to the United States was US\$100.9 billion, down 4.2 % from the same period last year. In the same period last year, it decreased by 1.6 %, accounting for 10.2 % of total agricultural exports [8].

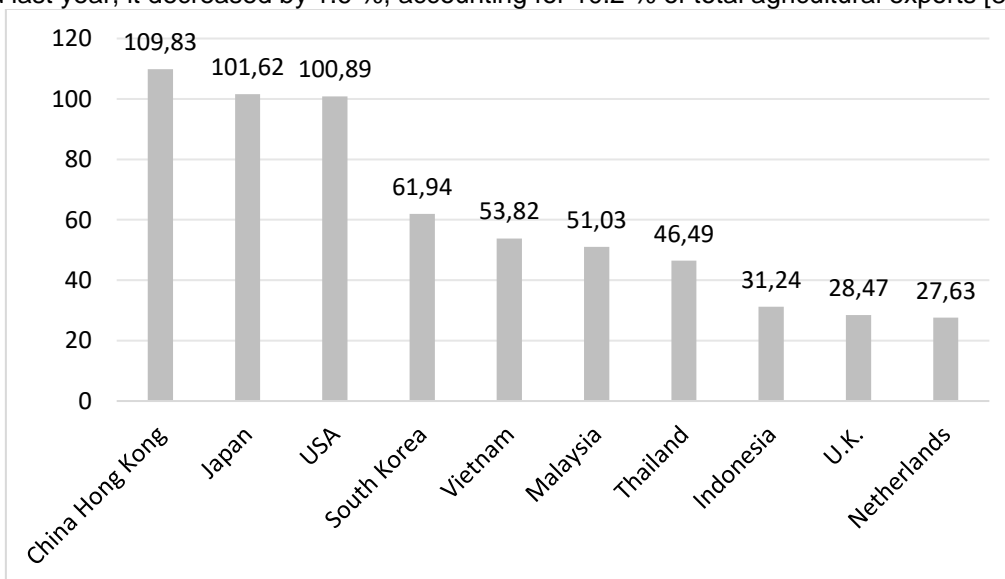


Fig. 3. Top 10 agricultural exporting partners of China in 2023, USD billion  
 Source: National Bureau of Statistics of China

In 2023, the total imports of China's top ten agricultural product importing provinces and cities accounted for 83.2 % of the total agricultural product imports. Shanghai topped the list, with imports of US\$31.83 billion, an increase of 1.3 % over the same period last year, accounting for 13.6 % of total agricultural product imports. Guangdong Province ranked second, with an import volume of US\$31.52 billion, a decrease of 2 % from the same period last year, accounting for 513.5 % of the total agricultural product imports. Beijing ranked third, with an import value of US\$26.51 billion, a decrease of 9.6 % from the same period last year, accounting for 11.3 % of the total agricultural product imports. The import volume of agricultural products in the Guangxi Autonomous Region increased by 18.8 % compared with the same period last year, the highest increase among the top ten importing provinces and cities [8].

In 2023, the total export volume of China's top ten agricultural exporting provinces accounted for 78.6 % of total agricultural exports. Shandong Province is China's largest exporter of agricultural products, with exports reaching US\$20.98 billion, an increase of 0.4 % over the same period last year, accounting for 21.2 % of total agricultural exports. Guangdong Province ranked second, with exports of US\$18.61 billion, an increase of 7.6 % over the same period last year, accounting for 18.8 % of total agricultural exports. Fujian Province ranked third, with exports of US\$11.34 billion, a year-on-year decrease of 11.1 %, accounting for 11.5 % of total agricultural exports [2].

Agricultural products are products brought about by agricultural production. They are primary products derived from planting, forestry, animal husbandry, fishery, etc. They are plants, animals, microorganisms and their products obtained from agricultural activities. Judging from the two five-year plans from 2014 to 2022, the total output value of China's agricultural products has shown an overall steady upward trend. The total output value of China's agriculture, forestry, animal husbandry and fishery industry in 2022 will be 15.61 trillion yuan, a year-on-year increase of 6.2 %. Among them, agricultural output value accounted for 54.1 %; animal husbandry output value accounted for 26.05 %; fishery output value accounted for 9.91 %; forestry output value accounted for 4.37 % [8; 11].

From the perspective of regional distribution of output value, Shandong, Henan, Sichuan, Hubei, and Guangdong are the top five provinces in China's total output value of agriculture, forestry, animal husbandry, and fishery, with output value accounting for 7.77 %, 7.02 %, 6.32 %, 5.73 %, and 5.70 % respectively [6].

#### **SWOT analysis of China's agricultural products import and export**

*Advantages of China's import and export trade of agricultural products.* With the economic and social development and the improvement of residents' income levels, people's demand structure and quality requirements for agricultural products continue to upgrade. The demand for the import of some high-quality, specialty, organic and other high-end agricultural products will continue to increase. Some countries have gradually relaxed restrictions on agricultural products. Restrictions on the import and export of agricultural products have promoted the development and cooperation of international trade. China has strong international competitiveness in some advantageous agricultural products, such as fruits, vegetables, tea, aquatic products, etc., and has great export potential; however, due to the constraints of China's natural resource conditions and production costs, some of China's The self-sufficiency rate of important agricultural products is still low, and the focus will be on core agricultural products with high added value and ensuring people's food and clothing. Through the adjustment of the industrial structure, there is a high dependence on foreign agricultural products. Although imports are decreasing year by year, they are still in the world. China is also a major importer of agricultural products [3; 7].

*Disadvantages in China's import and export trade of agricultural products.* China's agricultural product import structure is unbalanced, with grain, oilseeds, meat and other important agricultural products as the main products, accounting for more than 60% of total imports. These agricultural products are mainly used to meet China's domestic consumption needs and ensure national food security, reflecting China's insufficient production capacity in these fields. China's export of agricultural products is restricted by the quality management systems and trade barriers of various countries around the world, resulting in an uneven distribution of agricultural export targets, mainly Asian countries, supplemented by European and American countries. These Asian countries are mainly major agricultural consumers in regions surrounding China or Southeast Asia. They have strong geographical advantages and cultural proximity with China and are able to accept the primary agricultural products provided by China. However, European and American countries are mainly developed countries or regions and are not interested in agricultural products. With high quality standards and technical barriers, there are greater constraints and requirements on the deep-processed products provided by China.

*Opportunities in China's agricultural products trade.* In recent years, the Chinese government has introduced a series of policies to support agricultural development, including financial subsidies, tax policies, loan support, etc., providing strong policy, financial, and technical support for new technologies, new varieties, and new models in the agricultural field, and promoting It has led to the development of China's modern agriculture in the direction of scale, industrialization, standardization and intensification. In China's major agricultural production areas, a number of high-quality leading enterprises in the subdivisions of the agriculture, forestry, animal husbandry and fishery industries have emerged, driving the overall development of agriculture [4].

*Challenges to the development of China's agricultural products trade.* China's agriculture faces many practical problems, such as water shortages, declining farmland quality and other resource constraints, which pose certain challenges to the development of modern agriculture; excessive use of chemical fertilizers and pesticides, agricultural waste pollution and other issues pose a serious threat to the sustainability of agriculture. Development and green agricultural development have brought pressure; the increasing degree of agricultural internationalization has put forward higher requirements for agricultural safety, health, green and other systems and mechanisms, and has put forward higher requirements for China's agricultural development concept [5].

**Conclusions from the conducted research.** With the continuous advancement of agricultural science and technology, Chinese agriculture will actively participate in international competition and cooperation, expand overseas markets, enhance international competitiveness, and improve grain output and quality on the basis of ensuring food security through agricultural science and technology innovation. At the same time, the process of agricultural mechanization should be accelerated, the level of automation and intelligence of agricultural production should be improved, and the efficiency and effectiveness of agricultural production should be improved based on saving resources and costs.

Among the most crucial recommendations, we should highlight the need of:

- optimization of the agricultural product processing industry chain and enhancement of the added value and brand influence of agricultural products;
- improvement the depth and breadth of agricultural product processing and increase the production and export of high-value-added deep-processed products;
- active participation in the formulation and reform of international trade rules and promotion of the establishment of a fair, open and transparent international trade system;
- increasing the export share to developed countries and emerging markets;
- utilization of the free trade agreements and other mechanisms to lower entry barriers and increase export share.

By integrating the upstream and downstream resources of the agricultural industry chain, we can achieve an organic combination of agricultural production, processing, sales and other links to increase the added value of agriculture. The function of agriculture will not only be limited to food production but will also be expanded to multi-functional fields such as leisure tourism and cultural inheritance. At the same time, the export structure of agricultural products should be flexibly adjusted to provide different types and qualities of agricultural products according to the demand characteristics of different markets to increase export earnings.

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### **CHINA'S AGRICULTURAL FOREIGN TRADE FLOWS: TRENDS, CHALLENGES, AND OPPORTUNITIES**

**Purpose.** The aim of the article is to analyse China's agricultural import and export in the context of global geopolitical transformations and identification of trends, challenges, and opportunities for the state's agricultural policy based on this analysis.

**Methodology of research.** The following methods were used in the research: analysis and synthesis to evaluate the dynamics, product, and geographical structure of China's agricultural foreign trade; SWOT analysis to assess the strengths, weaknesses, threats, and opportunities of the state's agricultural policy; abstract and logical method to summarize information from various sources and create a comprehensive understanding of the researched problem, forming theoretical conclusions and generalizations; and graphical method to visualize the research results.

**Findings.** It was found that in 2023, the dynamics of China's foreign trade in agricultural products continued to show a growth trend that has been observed over the past decade. It was demonstrated that the development of China's agricultural exports has effectively contributed to the deep expansion and diversification of the agricultural value chain, opening new opportunities for promoting high-quality agricultural development. At the same time, it was noted that China has abolished non-tariff measures on agricultural products and export subsidies for all agricultural products, making it one of the most open markets for agricultural products. However, it was proven that in terms of imports, China remains one of the most dependent countries in the world, which is related to the relatively small area of arable land, large population, and insufficient intensification, technological development, and mechanization of tangible agricultural production.

**Originality.** The research on trends in the development of China's international trade in agricultural products in the post-COVID period has been further developed, taking into account new geopolitical realities. Using the SWOT analysis method, the strengths, weaknesses, threats, and opportunities of China's agricultural policy were identified.

**Practical value.** The substantiated conclusions and recommendations derived from the research can be used to determine the strategic directions for the development of China's trade relations, as well as to intensify agricultural trade flows between Ukraine and China.

**Key words:** international trade, export, import, agriculture, peripheral regions, foreign policy, global risks, competitiveness.

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## СІЛЬСЬКОГОСПОДАРСЬКІ ЗОВНІШНЬОТОРГОВЕЛЬНІ ПОТОКИ КИТАЮ: ТРЕНДИ, РИЗИКИ ТА МОЖЛИВОСТІ

**Мета.** Аналіз імпорту та експорту сільськогосподарської продукції Китаю в умовах глобальних геополітичних трансформацій та виявлення на цій основі тенденцій, викликів та можливостей для аграрної політики держави.

**Методи дослідження.** У ході дослідження використано такі методи: аналізу та синтезу – для оцінювання динаміки, продуктової та географічної структури зовнішньої торгівлі сільськогосподарською продукцією Китаю; SWOT-аналіз – для оцінювання переваг, недоліків, загроз та можливостей аграрної політики держави; абстрактно-логічний – для узагальнення інформації з різних джерел і створення комплексного уявлення про досліджувану проблему, формування теоретичних висновків і узагальнень; графічний – для візуалізації результатів дослідження.

**Результати дослідження.** Виявлено, що у 2023 році динаміка зовнішньої торгівлі Китаю сільськогосподарськими продуктами продемонструвала продовження тренду до зростання, що спостерігається протягом останнього десятиліття. Продемонстровано, що розвиток експорту сільськогосподарських продуктів Китаю ефективно сприяв глибокому розширенню та диверсифікації ланцюга доданої вартості в сільському господарстві, відкриваючи нові можливості для просування високоякісного розвитку сільського господарства. Водночас відзначено, що Китай скасував нетарифні заходи на сільськогосподарську продукцію та експортні субсидії на всі сільськогосподарські продукти, що зробило державу одним із найбільш відкритих ринків сільськогосподарської продукції. Разом із тим доведено, що у випадку імпорту Китай залишається однією з найбільших залежних держав у світі, що пов'язано із відносно невеликою площею оброблюваних земель, великою чисельністю населення та недостатньою інтенсифікацією, технологічним розвитком та механізацією матеріального сільськогосподарського виробництва.

**Наукова новизна результатів дослідження.** Дістало подальшого розвитку дослідження тенденцій розвитку міжнародної торгівлі сільськогосподарськими товарами Китаю у постковідний період з урахуванням нових геополітичних реалій. На основі методу SWOT-аналізу виявлено переваги, недоліки, загрози та можливості аграрної політики Китаю.

**Практична значущість результатів дослідження.** Обґрунтовані за результатами дослідження висновки і пропозиції можуть бути використані при визначенні стратегічних векторів розвитку торговельних відносин Китаю, а також для інтенсифікації торговельних сільськогосподарських потоків між Україною та Китаєм.

**Ключові слова:** міжнародна торгівля, експорт, імпорт, сільське господарство, периферійні регіони, зовнішня політика, глобальні ризики, конкурентоспроможність.