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Prepared By: Jon Ann Flemings & Garrett McDonald

Approved By: Jon Flemings

Report Highlights:

The Guangdong-Hong Kong-Macao Greater Bay Area (GBA) is a Chinese government initiative that aims to link nine cities in Guangdong (Guangzhou, Shenzhen, Zhuhai, Foshan, Dongguan, Zhongshan, Jiangmen, Huizhou, Zhaoqing) with two Special Administrative Regions (Hong Kong, Macao) to drive economic activity, innovation, and integration with the goal of turning the region into a world-class business hub by 2035. This report focuses on the impact the initiative on agricultural exports to the region.

Overview

The Guangdong-Hong Kong-Macao Greater Bay Area (GBA) is a Chinese government initiative that aims to link nine cities in Guangdong (Guangzhou, Shenzhen, Zhuhai, Foshan, Dongguan, Zhongshan, Jiangmen, Huizhou, Zhaoqing) with two Special Administrative Regions (Hong Kong, Macao) to drive economic activity, innovation, and integration with the goal of turning the region into a world-class business hub by 2035.

Chart 1: Greater Bay Area Cities



Source: Map by Data V, edited by ATO Guangzhou

The GBA is one of China’s most dynamic and economically vibrant regions. Collectively, the GBA is home to over 87 million people and contributes 11 percent of China’s GDP. Known for its innovation, advanced manufacturing, robust services sector, and global financial centers, the region plays a pivotal role in driving China’s development agenda.

Table 1. Greater Bay Area 2024 Population and GDP (Calculated; \$1=RMB7.12)

City	Population (million)	GDP (billion USD)	Per Capita GDP (USD)
Shenzhen	17.99	516.9	28,732
Guangzhou	18.98	435.8	22,961
Foshan	9.62	187.7	19,511
Dongguan	10.49	172.5	16,444
Zhongshan	4.46	58.2	13,049
Huizhou	6.07	86.2	14,201
Zhuhai	2.52	62.9	24,960
Zhaoqing	4.13	41	9,927
Jiangmen	4.82	59.1	12,261
Hong Kong	7.53	407.3	54,134
Macao	0.69	50.6	73,703
Total	87.3	2078.2	23,805

Source: Guangdong Bureau of Statistics, Hong Kong Trade Development Council

The GBA Agricultural Landscape

Agricultural production (encompassing forestry, husbandry, and fishery) accounts for a small share of the GBA's overall economy. The region's agricultural output is characterized by concentrated production systems, aquaculture, and value-added food processing. Guangdong Province is among the top provinces in China for livestock and poultry production, while cities like Zhuhai and Zhongshan support robust fisheries and modernized greenhouse vegetable operations. Due to urbanization, the GBA increasingly relies on imported agricultural inputs and food supply, especially high-value and specialty products. This reliance drives demand for imported, premium food ingredients, as well as collaboration in growth areas such as cold-chain logistics, food processing, and agricultural innovation. As the GBA continues to evolve into a regional hub for high-quality consumption and food distribution, it offers U.S. exporters both a key market and a testing ground for the broader China market.

GBA Agricultural Imports

While agriculture is not the primary industry in this heavily urbanized region, it plays a growing and strategically important role in supporting food security, trade, food processing industries and consumer demand for high-quality, imported agri-food products. With rising incomes, a strong presence of food processing and logistics infrastructure, and sophisticated consumer markets, the GBA represents a critical gateway for agricultural imports, including high-value U.S. agricultural products. Key aspects of the GBA's impact on agricultural trade include:

Gateway for Agricultural Trade: As a leading port and logistics cluster, the GBA facilitates the import and distribution of a significant share of China's agricultural and food products, including U.S. exports. The GBA port cluster is one of the world's largest regional port clusters in terms of freight traffic.

Consumer-Driven Demand: GBA consumers—especially in urban centers like Hong Kong, Shenzhen, and Guangzhou—demonstrate strong preferences for high-quality, safe, and premium agri-food products, creating opportunities for the wide array of U.S. delicacies, including wine, tree nuts, dairy, meat, fresh produce, and more.

Innovation and Agricultural Technology: The region's emphasis on innovation and digitalization extends into agriculture, with growing investment in agricultural technology, e-commerce platforms, and cold chain logistics. For example, DJI (a Shenzhen-based world leader in drones) has invested in R&D for commercial deployment of **agricultural drones** for crop spraying, mapping, and precision monitoring.

Policy Support and Regional Integration: Unique trade-facilitating measures exist between the mainland, Hong Kong, and Macao to accelerate the GBA development of integrated supply chains and food safety standards, further enhancing the region's attractiveness as a hub for agricultural trade.

Table 2. Greater Bay Area Snapshot

GREATER BAY AREA SNAPSHOT	
Opportunity	Comment
High Purchasing Power and Demand for Imported Goods	The GBA comprises some of China's wealthiest cities — including Guangzhou, Shenzhen, and Hong Kong — where higher incomes have driven increased consumer demand for premium, safe, and healthy imported food products. Consumers in the region demonstrate strong demand for U.S. consumer ready products, including tree nuts, fresh fruits, wine, meat and dairy products.
Major Entry Points for U.S. Agricultural Exports	The region has some of China's most important ports and logistics hubs, including the Port of Hong Kong and Hong Kong International Airport, Shenzhen's Yantian and Shekou ports, and Guangzhou's Nansha Port. These ports serve as critical entry points for U.S. agricultural exports and offer advanced cold-chain and customs clearance capabilities. Hong Kong in particular, serves as a regional transshipment center, re-exporting approximately 42 percent of its annual \$24 billion of agricultural imports.
Policy Environment Favoring Agri-Trade Innovation	The GBA is a pilot region for economic reform and cross-border integration. The PRC government has announced initiatives such as Cross-border e-commerce zones and smart customs and inspection platforms . Additionally, the GBA's role in China's national strategy for food security and supply chain modernization means that international partnerships in agricultural technology, cold-chain logistics, and sustainable farming have strong growth potential.
Agricultural Trade Hubs and Industry Clusters	Mainland cities such as Zhongshan, Foshan, and Zhuhai are increasingly involved in food processing, distribution, and wholesale of ag products — including imported items. These cities act as midstream hubs that connect imported goods to retail and foodservice channels across southern China.
Rising Role in Agri-Food Innovation	The GBA is emerging as a center for agricultural food innovation, following investments in food technology, biotechnology, and cross border academic collaboration. For example, a project between Hong Kong University of Science and Technology and Sun Yat-sen University in Guangzhou is researching the threats to food security. U.S. companies and exporters exploring food innovation (i.e., new technology, health-oriented goods) can find opportunities for joint development, marketing partnerships, and consumer research.

The GBA and U.S. Agricultural Products

Nine cities in Guangdong province (specifically, Guangzhou, Shenzhen, Zhuhai, Foshan, Dongguan, Zhongshan, Jiangmen, Huizhou, and Zhaoqing) function as the GBA's major driver and economic hub, importing a variety of agricultural products from the United States. Key imports support Guangdong's food processing and livestock industries - such as soybeans, corn, and wheat. Additionally, a wealth of other consumer-oriented goods (beef, pork, dairy items, tree nuts) are dispersed throughout the province's large and assorted population or incorporated into China's growing food processing industry.

In 2024, Hong Kong was the 21st-largest market for all U.S. agricultural products and a top 10 market for consumer-oriented agricultural goods (including seafood). That same year, the United States exported \$1.5 billion of agricultural products and was the third-largest supplier of consumer-oriented food products to Hong Kong after China and Australia. Hong Kong is a significant market for U.S. exports of beef, poultry, tree nuts, fresh fruit,

ginseng, wine, and other high-value goods. Hong Kong also serves as a free port and gateway to broader markets in south China, Macau, and southeast Asia.

With a population of just under 700,000, Macau is one of the smaller regions in the GBA cluster. However, in terms of economy, the former Portuguese colony has the highest per capita GDP, while its casino-driven growth model has attracted significant international investment and tourism. Like Hong Kong, Macau purchases consumer-oriented goods to support high-end restaurants and casino clientele. Most of Macau's agricultural imports from the United States arrive as re-exports from Hong Kong.

Agricultural Technology and Innovation

The GBA is a national leader in smart agriculture, integrating high-tech solutions to enhance food production and sustainability. China's national smart agriculture strategy aims to digitize the agricultural industry by 2028 through widespread adoption of technology (i.e., GPS, AI). The GBA project goes further by promoting cross-border agricultural research and collaboration. For example,

- The Hong Kong-Zhuhai-Macao Modern Agriculture Demonstration Park was built in July 2022 in Zhuhai, featuring a 200,000-square-meter semi-enclosed glass greenhouse employing advanced climate control and automation technologies to optimize crop yields. The park produces more than 7,000 tons of fruits and vegetables annually, including tomatoes, cucumbers, and strawberries.
- A leading agricultural firm in Guangdong utilizes robotics and artificial intelligence to help farmers overcome challenges (i.e., labor shortages, climate variability).
- Hong Kong has implemented innovative aquaponic systems that combine fish farming with hydroponic vegetable cultivation, reducing the need for fertilizers and promoting sustainable urban agriculture.
- The Shenzhen Campus of the Chinese University of Hong Kong (CUHK) and the Guangdong Provincial Department of Science and Technology jointly launched a \$12 million three-year project to support collaborative research projects. This program resulted in joint laboratories, innovation platforms, and other enhanced cooperation across the GBA.
- CUHK's Laboratory of Agrobiotechnology signed a collaboration agreement with the Guangdong Academy of Agricultural Sciences in 2023, focusing on cultivations like soybean genomics and crop improvement.
- Shenzhen opened the Regional Comprehensive Economic Partnership (RCEP) Agricultural Trade Cooperation Center in 2023. The center aims to integrate agricultural production, research, processing, and trade, fostering international cooperation and enhancing the export of Guangdong's agricultural products. In short, the center brings together the resources of the GBA with the benefits of the RCEP (a free trade agreement encompassing 15 Asia-Pacific countries).

GBA Food Consumption Trends

Hotel, Restaurant and Institutional Sector

The Hotel, Restaurant, and Institutional (HRI) sector in the GBA has experienced significant, post-COVID growth, driven by a surge in tourism and infrastructural projects. In 2024, Hong Kong received 44.5 million visitors, up 31 percent from 2023, with hotel occupancy rates averaging nearly 85 percent. Macao received 34.9 million visitors, up 23.8 percent from 2023, with hotel occupancy surpassing 90 percent during peak periods. Guangdong's 2024 revenue from tourism reached \$154.5 billion, a growth of 15.8 percent from 2023. The recovery of the hospitality sector has driven the expansion of hotel infrastructure. In 2023, the number of hotel rooms in the 4 most-visited GBA cities restored to 94 percent of pre-COVID rates. Hotel rooms in Guangzhou

reached 384,563; in Shenzhen 339,756, in Hong Kong 90,109, and in Macau 47,000. This growth, coupled with transportation improvements (i.e., Hong Kong-Zhuhai-Macao Bridge) has intensified competition, prompting hotels to diversify services and cater to a broader clientele.

Table 3. GBA Tourism and Revenue

GBA Tourism		
City	Tourism Revenues (\$ Billion)	Number of Tourists (Million)
Guangzhou (2023)	45.3	234
Shenzhen (2023)	32.6	167
Dongguan (2023)	7.5	58
Foshan (2023)	7.3	55.9
Zhuhai (2023)	7.2	42.6
Huizhou (2023)	5.7	45.4
Jiangmen (2023)	3.4	22.8
Zhongshan (2023)	2.5	20.8
Zhaoqing (2023)	2.4	16.9
Hong Kong (2024)	25	44.5
Macao (2024)	9.4 (excluding casino revenues)	34.9

Source: <https://xianxiao.ssap.com.cn/catalog/7661162.html>

Guangzhou has over 186,000 restaurants, the largest number of restaurants in the country. Franchise chains are a growing trend within the GBA's HRI industry, as owners aim to streamline management, buy in bulk and limit overhead costs, while maximizing brand recognition. This trend can also help, as consumers in the GBA often use digital platforms to assess restaurants.

Retail

The growth of the GBA's food and beverage retail sector reached 2.5 percent in 2024. Consumers are increasingly budget conscious, resulting in mixed results across the region. An increasing number of Hong Kong residents travel to Shenzhen for food purchases, leading to a 4.7 percent decline in retail sales in the first seven months of 2024. Guangdong province, the economic powerhouse of the GBA, experienced a 0.8 percent decline in 2024 following the robust 5.8 percent growth in 2023. Shenzhen was the recipient of increased sales, as well as the headquarters for several major national retailers, including Wal-Mart/Sam's Club, CR-Vanguard, Ole, Rainbow and Aeon.

Generally, the food retail sector in the GBA is evolving. The sector is marked by a blend of traditional markets, supported by modern retail formats (i.e., supermarkets, hypermarkets, e-commerce, social media). Social media such as Douyin (Chinese TikTok) and Red Note are increasingly being used as marketing tools by businesses to promote and sell their products and services. The integration of online and offline channels is increasingly prevalent, catering to the tech-savvy population's demand for convenience.

Warehouse Clubs

By the end of 2024, Sam's Club opened 9 stores in GBA: 2 in Guangzhou, 4 in Shenzhen, 1 in Dongguan, 1 in Zhuhai, and 1 in Huizhou. A store in Zhongshan is slated for opening in September 2025. The store in Zhuhai reached sales of \$3.4 billion in 2023, ranking 7th among all the Sam's Club stores in China. Hong Kong currently does not have a Sam's Club store, but as of June 2024, Hong Kong residents can take advantage of Sam's Club's cross-border delivery service from mainland stores.

Costco has seven locations in China, one of which is in the GBA. Costco opened its first southern China store in Shenzhen in January 2024. On and before the opening day, the store attracted more than 140,000 fee-paying members – including Hong Kong residents, demonstrating the strong purchasing power of the local and nearby population.

E-commerce

E-commerce is a booming component of GBA's strong logistics infrastructure. Cities like Shenzhen and Guangzhou serve as innovation hubs for China's digital economy, home to major platforms such as VIP.com, Pinduoduo, and Temu. Platforms like Meituan and Ele.me offer customers fast delivery of food and grocery products. Cross-border e-commerce is particularly significant in the GBA, with Hong Kong and Macau serving as avenues for international brands to directly reach mainland consumers—especially in high-demand categories like health supplements and personal care products. (This [advisory](#) contains information about the risks of using Chinese owned or hosted applications.)

Trade and Logistics Infrastructure

The GBA, in particular Hong Kong, Shenzhen, and Guangzhou, have world-class trade and logistics infrastructure. Hong Kong International Airport has been the world's busiest air cargo airport since 2010, handling 4.9 million metric tons in 2024. Shenzhen's Yantian Port is a major container gateway, moving over 17 million TEUs (Twenty-Foot Container Equivalent Unit) in 2024 while Guangzhou Port ranks among China's top 5 ports, with throughput exceeding 21 million TEUs in 2024. These cities are interconnected by a network of high-speed railways and expressways, supported by advanced customs procedures and bonded logistics zones, making the GBA a critical hub for trade.

To support the growing demand for temperature-controlled goods, the GBA is rapidly advancing its cold-chain logistics infrastructure through growth, as well as the use of AI. The driving time between most GBA cities is approximately 2 hours. In 2022, Guangdong Province ranked second in the country for its cold-chain storage capacity at 4.7 million metric tons. In April 2024, an additional cold-chain storage and industrial park officially opened in Guangzhou. Foshan also opened a cold-chain logistic park in 2024, with a capacity of 100,000 metric tons.

Appendices

Relevant USDA Reports

[China: Exporter Guide Annual](#)

[Navigating China's Social Media Landscape: A Guide for US Agricultural Exporters](#)

[Celebrating 30 Years of Jiangnan Market](#)

[Hong Kong: Exporter Guide Annual](#)

[Hong Kong Maintains Its Position as a Wine Trade Hub](#)

[Cultivating Opportunities for U.S. Exports to Hong Kong](#)

Contact information

USDA Agricultural Trade Office in Guangzhou

Tel: (86-20) 3814-5000

Fax: (86-20) 3814-5310

Email: ATOGuangzhou@usda.gov

USDA Agricultural Trade Office in Hong Kong

Tel: (852) 2841-2350

Fax: (852) 2845-0943

E-Mail: ATOHongKong@usda.gov

Attachments:

No Attachments.