

#45 China's Drive for Food Sovereignty: Navigating Opportunities and Risks in Sino-Dutch Agrifood Collaboration

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Key Takeaways

- China is prioritizing food security as a strategic issue.
- Agriculture is shifting toward sustainability and smarter management.
- Demand is growing for knowledge-driven, long-term partnerships in the agrifood sector.
- Real opportunities exist—but so do geopolitical and policy risks.
- Collaboration works best when solutions are locally adapted.

Recommendations

For the Dutch Government:

1. **Engage sub-nationally:** Strengthen “Province-to-Province” partnerships between Dutch Greenports and key Chinese provinces.
2. **De-risk collaboration:** Launch a public-private fund and a “China Agri-food Risk Toolkit” to support pilot projects with clear IPR and data frameworks.
3. **Ensure continuity:** Establish a mechanism to track long-term collaborations, preventing any disruption caused by personnel changes.

For Dutch Companies:

1. **Become a systemic partner:** Shift roles from supplier to “system integrator,” offering integrated solutions that include energy optimization, training and long-term operational support.
2. **Pursue “localization with protection”:** Forge joint ventures with clear IPR frameworks, ensuring two-way talent and knowledge flow.
3. **Navigate local governance:** Invest in understanding the distinct political-economic models of projects in eastern versus western China and build relationships with both private champions and local agricultural bureaus.
4. **Focus on SMEs:** Broaden the scope of partnerships to include innovative Chinese SMEs, which are often key engines of growth.

Executive Summary

For China, food security is a cornerstone of national security and regime legitimacy. China has moved beyond staple grain self-sufficiency to a broader “Great Food View” strategy, covering horticulture and livestock to meet changing dietary demands and ensure resilience. This drive for food sovereignty is not isolationist: it requires international collaboration to access technology and innovation. For the Netherlands, this presents opportunities, though collaboration entails risks, including a complex policy environment, geopolitical tensions, and intellectual property concerns. This report analyses China’s policy landscape, sectoral needs, and risks perceived by Chinese enterprises.

The report addresses three questions: 1) What are the focal points and ambitions of China on agri-food development, domestically and globally? 2) What are needs in horticulture and livestock, and how could Dutch actors contribute? 3) What challenges and risks do Chinese companies perceive in CN-NL interactions? Research was commissioned by the China Knowledge Network of the Government of the Netherlands. Conclusions are solely those of the authors.

China’s strategy balances domestic production with global engagement. It has shifted from domestic focus to moderate imports and supply diversification and is now the world’s largest importer of agricultural commodities. Rice and wheat remain protected, while imports of soy, meat, and specialty products have grown. The Belt and Road Initiative diversifies sourcing, reducing dependency risks. Companies like COFCO and ChemChina (Syngenta) operate globally. Domestically, safeguards include protecting scarce arable land through “red lines” and high-standard farmland projects, promoting technological innovation via initiatives like the National Smart Agriculture Action Plan, and restructuring agriculture with enterprise support. Agri-tech innovation is key to overcoming resource constraints.

Policy implementation varies by region and entity. Eastern regions are often land-driven, linking greenhouses to urban development; western regions are subsidy-driven, aligning with local goals like poverty alleviation. SOEs engage more in planning; private companies in operations. This creates risks: policy contradictions, geopolitics limiting cooperation, ineffective local implementation, low operational capability, and misaligned expectations.

Sectoral needs differ: Horticulture faces a “hardware-software” gap, requiring integrated, localized solutions, management systems, and training. Livestock faces structural constraints: breeding breakthroughs require data sharing, but domestic distrust limits collaboration. SMEs seek long-term partnerships on circular feed systems and refined management rather than transactional trade.

Sino-Dutch agri-food cooperation remains promising, depending on understanding China’s context, sector needs, and operational risks.