

# China Animal Feed Industry Review to 2018 - Thriving Aquaculture Sector to Accelerate Growth

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## Abstracts

The industry research publication titled 'China Animal Feed Industry Review to 2018- Thriving Aquaculture Sector to Accelerate Growth' presents a comprehensive analysis of market size by production value and volume of animal feed and its different types in China. The report entails the market share analysis and company profiles of major players in China's animal feed industry. The future analysis, trends and developments, growth drivers, issues and challenges, and market segmentation by type of animal feed and feed for different animal species have also been discussed in the industry research report.

Animal products such as meat, milk and eggs are an expensive source of food as compared to stable crops. Due to this, the consumption of animal protein in the developing nations is well below the world average. However, the transition in the economies of these countries has lead to growth in disposable income, purchasing power and the consequential rise in demand for animal protein. Food consumption level is now considered a clear indicator of the size of a country's population and the health of its economy.

The production of animal protein is directly dependent upon what is consumed by the animal itself. Sufficient and quality feed commands animal health by lowering mortality rate, susceptibility to diseases, calving periods and increasing fertility and reproductive parameters. It is observed that poor feeding practices are the primary reasons for low animal production in developing countries. Thus, animal feed is the basis of all types of animal proteins that are ultimately consumed by humans.

Realizing the importance of animal feed, several countries in the world are increasing their manufacturing activities of feed for supporting their livestock sector. A total feed

tonnage of ~ million tons was produced globally in 2013, while Asia took the lead as the largest feed manufacturing region with ~ million tons and 36.1% share in the total production. China is the major country contributing to the growth of the feed industry in Asia.

China is accredited of being the largest animal feed producer in the world and has grown exponentially since the past few years. The animal feed industry in China grew at a CAGR of 6.9% during 2008-2013, from ~ million tons production in 2008 to ~ million tons in 2013. The production value of animal feed in China registered a CAGR of 14.1% during 2008-2012 and was assessed at USD ~ million in 2012.

Animal feed is available in the form of compound feed, concentrate feed and feed premixes and additives. With ~ million tons production, compound feed accounted for the largest share of ~% in the overall production of animal feed in China in 2013. The output of compound feed registered a CAGR of 8.8% during 2008-2013, with ~ million tons production in 2008 and ~ million tons in 2013. During the same year, while ~ million tons of concentrate feed was manufactured in China, premixes and additives had a production volume of ~ million tons. Concentrate feed is observed to have been losing its market share to compound feed since the past few years. It was observed that premixes and additives was the only segment to grow at a positive rate of 1.8% from 2012 as compared to compound and concentrate feed.

Animal feed in China is directed towards 6 broad categories of animal species, specifically, pig, layer poultry, boiler poultry, aquaculture, ruminant and other species. Since China is the largest producer and consumer of pork in the world, pig feed is the principal category of animal feed catering to the vast pig population in the country. The output of pig feed in China in 2013 was ~ million tons, growing at 11.8% CAGR during 2008-2013, followed by feed for layer poultry, boiler poultry, feed for aquaculture, ruminant feed and feed for other animals such as horses and pets.

Raw material costs comprise nearly 70% of the total production cost of animal feed in China. The country imports soybean, fish meal, corn and wheat in vast quantities in order to satisfy its domestic demand for animal feed production. Additionally, China is largely reliant on import of methionine, a vital feed additive. Since the country is the largest producer of animal feed globally, China exports huge quantities of the commodity to several nations across the world.

The animal feed industry in China is highly fragmented with nearly ~ mills engaged in manufacture of the same. The leading feed companies in China include New Hope

Liuhe Co. Ltd., CP Pokphand Co. Ltd and Guangdong Haid Group. Already the largest animal feed producer in the world, China continues to grow at an unprecedented rate not only fulfilling its domestic demand for feed but also catering to the needs of several other countries around the world. The country is projected to produce ~ million tons of animal feed in 2018, registering a CAGR of 4.7% during 2013-2018. While pig feed is anticipated to continue being the largest segment, feed for aquaculture is projected to grow at the highest CAGR during 2013-2018. Due to the rapid industrialization of China and increasing manufacturing activities, the country is expected to remain the largest animal feed producer in the times to come.

## **KEY TOPICS COVERED IN THE REPORT**

The market size of China Animal Feed Industry in terms of production volume and value

Market segmentation of the animal feed industry in China by type of feed and feed for specific animal species

Import of raw materials and export scenario

Trends and developments in China animal feed industry

Government regulations and certifications in the China animal feed industry

Growth drivers and challenges in the animal feed industry in India

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Competitive scenario of major companies in China animal feed industry

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