

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 led 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

Market shares of major players in India paper industry by production and turnover

Competitive scenario of major companies in China animal feed industry

Future outlook and projections of animal feed industry in China

Contents

1. CHINA ANIMAL FEED INDUSTRY INTRODUCTION

2. VALUE CHAIN ANALYSIS OF CHINA ANIMAL FEED INDUSTRY

2.1. Animal Feed Industry Value Chain

2.2. Role of Animal Feed in Animal Protein Value Chain

3. CHINA ANIMAL FEED MARKET SIZE, 2008-2013

3.1. By Production Volume, 2008-2013

3.2. By Production Value, 2008-2012

4. CHINA ANIMAL FEED MARKET SEGMENTATION

4.1. Animal Feed Production by Species, 2008-2013

4.2. By Type of Feed, 2008-2013

5. IMPORT AND EXPORT SCENARIO IN CHINA ANIMAL FEED INDUSTRY

5.1. Import of Raw Materials for Animal Feed, 2008-2013

5.1.1. Soybean, 2008-2013

5.1.2. Fish Meal, MY'2008-MY'2013

5.1.3. Corn, 2008-2013

5.1.4. Wheat, 2008-2013

5.1.5. Methionine, 2008-2013

5.2. Exports

6. TRENDS AND DEVELOPMENTS IN CHINA ANIMAL FEED INDUSTRY

Growing Production of High-technology Additives in China

Consolidation of the Industry

Increasing Usage of Wheat as Raw Material

Changes in Feed Portfolio by Species

7. GOVERNMENT REGULATIONS IN CHINA ANIMAL FEED INDUSTRY

Agricultural Law of the People's Republic of China 2002

PRC Law on Agricultural Product Quality Safety 2006
Feeds and Feed Additives Administration Regulations
Animal Feed Product Safety and Health Management Regulations
GMP+ Feed Certification Scheme

8. GROWTH DRIVERS OF CHINA ANIMAL FEED INDUSTRY

Booming Aquaculture Sector
Increasing Animal Protein Consumption
Increasing Demand for Premixes and Additives
Increased Scale of Farming

9. ISSUES AND CHALLENGES IN CHINA ANIMAL FEED INDUSTRY

Reliance on Import of Raw Material
Incidence of Diseases in Animals
Overcapacity of the Animal Feed Industry

10. SWOT ANALYSIS OF CHINA ANIMAL FEED INDUSTRY

11. MARKET SHARE OF MAJOR PLAYERS IN CHINA ANIMAL FEED MARKET

12. COMPETITIVE LANDSCAPE OF MAJOR COMPANIES IN CHINA ANIMAL FEED INDUSTRY

13. CHINA ANIMAL FEED INDUSTRY FUTURE OUTLOOK AND PROJECTIONS, 2014-2018

- 13.1. By Production Volume, 2014-2018
- 13.2. By Animal Feed Production by Species, 2014-2018
- 13.3. Cause and Effect Relationship in China Animal Feed Industry

14. MACROECONOMIC FACTORS IN CHINA ANIMAL FEED INDUSTRY; HISTORICAL AND PROJECTED

- 14.1. Livestock Products Output in China, 2008-2018
- 14.2. Gross Output Value of Animal Husbandry in China, 2008-2018
- 14.3. Farmers' Per Capita Income in China, 2008-2018
- 14.4. Grain Production in China, 2008-2018

15. APPENDIX

15.1. Market Definitions

15.2. Abbreviations

15.3. Research Methodology

Data Collection Methods

Approach

Variables (Dependent and Independent)

Final Conclusion

15.4. Disclaimer

List Of Figures

LIST OF FIGURES

- Figure 1: Animal Feed Production by Different Regions in the World in Percentage (%), 2013
- Figure 2: China's Share in Animal Feed Production in the World in Percentage (%), 2008-2013
- Figure 3: China Animal Feed Industry Value Chain
- Figure 4: Animal Protein Value Chain
- Figure 5: China Animal Feed Market Size on the Basis of Production in Million Tons, 2008-2013
- Figure 6: China Animal Feed Market Size on the Basis of Production Value in USD Million, 2008-2012
- Figure 7: China Animal Feed Market Segmentation by Species (Pig, Layer Poultry, Boiler Poultry, Aquaculture, Ruminants and Others) on the Basis of Production in Percentage (%), 2008-2013
- Figure 8: China Animal Feed Market Segmentation by Types of Feed (Compound Feed, Concentrate Feed, Feed Premixes and Additives) on the Basis of Production in Percentage (%), 2008-2013
- Figure 9: China Production of Major Feed Additives in Percentage (%), 2008-2012
- Figure 10: China Imports of Soybean in Million Tons, 2008-2013
- Figure 11: China Imports of Fish Meal in Million Tons, MY'2008-MY'2013
- Figure 12: China Imports of Corn in Million Tons, 2008-2013
- Figure 13: China Imports of Wheat in Million Tons, 2008-2013
- Figure 14: China Imports of Methionine in Tons, 2008-2013
- Figure 15: China Animal Feed Industry Future Projections on the Basis of Production in Million Tons, 2014-2018
- Figure 16: China Animal Feed Market Future Projections by Species (Pig, Layer Poultry, Boiler Poultry, Aquaculture, Ruminants and Others) on the Basis of Production in Percentage (%), 2008-2013
- Figure 17: China Livestock Products' Output in Million Tons, 2008-2018
- Figure 18: China Gross Output Value of Animal Husbandry in USD Million, 2008-2018
- Figure 19: China Per Capita Farmers' Income in USD, 2008-2018
- Figure 20: China Grain Output in Million Tons, 2008-2018

List Of Tables

LIST OF TABLES

Table 1: Animal Feed Production by Different Regions in the World in Million Tons, 2013

Table 2: Number of Animal Feed Mills by Different Regions in the World, 2013

Table 3: Animal Feed Production in China and Rest of the World in Million Tons, 2008-2013

Table 4: China Animal Feed Market Segmentation by Species (Pig, Layer Poultry, Boiler Poultry, Aquaculture, Ruminants and Others) on the Basis of Production in Million Tons, 2008-2013

Table 5: China Animal Feed Market Segmentation by Types of Feed (Compound Feed, Concentrate Feed, Feed Premixes and Additives) on the Basis of Production in Million Tons, 2008-2013

Table 6: China Production of Major Feed Additives in Million Tons, 2008-2012

Table 7: SWOT Analysis of China Animal Feed Industry

Table 8: Sales Volume of Leading Listed Companies in China Animal Feed Industry in Million Tons, 2010-2012

Table 9: Revenue of Leading Listed Companies in China Animal Feed Industry in Million Tons, 2011-2012

Table 10: Competitive Scenario of Major Companies in China Animal Feed Industry

Table 11: China Animal Feed Market Future Projections by Species (Pig, Layer Poultry, Boiler Poultry, Aquaculture, Ruminants and Others) on the Basis of Production in Million Tons, 2008-2013

Table 12: Cause and Effect Relationship Analysis between Industry Factors and Expected Animal Feed Industry Prospects in China

Table 13: Correlation Matrix of the China Animal Feed Industry

Table 14: Regression Coefficients Output

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