

# China dairy market review & outlook 2008-2009 proposal

<https://marketpublishers.com/r/CC37880E9D2EN.html>

Date: March 2009

Pages: 193

Price: US\$ 1,850.00 (Single User License)

ID: CC37880E9D2EN

## Abstracts

### Research Background

There are significant changes in global dairy market in 2008. Due to rising cost and tight supply global dairy price hit a new high in 2007, which greatly influenced dairy policies in many countries, so supply and demand relationship got dramatically changes among those countries, including enhancing domestic production, reducing exports, stimulating dairy supply. In addition, the economic depression has spread around the world, causing decreasing resident income and consumption as well as demand for dairy products. Raw milk and dairy product prices are continuously dropping, including skim and whole milk powder, whey and cheese.

In 2008 china dairy industry should be separated two stages by Melamine Scandal. Before that it still grows at a fast rate and State Stat. Dept. shows that in the first eight months of this year, the yield of liquid and solid milk products are 10,178kt and 2,495kt, up by 12.07% and 7.34% than the same period of last year respectively; after the scandal in both Sept and October they dropped by 18.7%, 32.5% and 15.58%, 32.39% respectively. Resident demand for dairy products is seriously affected and the production of Yili and Mengniu dropped with 90%. Sanlu group is even closed and sold for auction. The whole dairy chain is making great losses after Melamine Scandal and dairy export is also facing unprecedented crisis.

In order to regulate china dairy market, in the first half year of 2008 the Government issued Requirements on Dairy Processing Permits and Dairy Industry Policies in March and May. After the Melamine Scandal, the Government issued Notification on Enhancing and Supervising Dairy Quality Regulation and Proposals on Dairy Industry Resumption in October and November and Food Safety Act will be implemented soon

to revise emerged problems related to the scandal. All these show that the Government is enhancing laws and regulations in dairy industry and dairy consumers are paying more attention on quality. Domestic dairy producers are changing strategy to reply new macro-environment. It is a good chance for international dairy enterprises to invest in China.

This report analyzes dairy production, consumption, market price, basic situation of import and export, market competition, relevant hot topics, policy direction and impact, development of main dairy processing and packaging enterprises in China and the development of the international dairy industry in 2007, there is also a forecast for the development trend of the Chinese dairy industry in 2008. This report gives an integrated analysis on the effects of Melamine Scandal.

This report is a joint product of the experts of the Dairy Department, Beijing Orient Agribusiness Consultants Ltd.. These senior dairy analysts also make advice for relevant departments and associations, and keep a beneficial relationship with major dairy enterprises, relevant industry enterprises, which provide precious information and data for this report, assuring the veracity, authority and forward looking. This is a rare report which shall be of great value for dairy investment companies, producers, material suppliers, equipment suppliers and research institutes both at home and abroad to understand the development trend of the dairy industry, to make decisions on the positioning of the enterprise and to formulate development strategies.

## Contents

### **CHAPTER 1 GENERAL TREND OF CHINA'S DAIRY INDUSTRY IN 2008**

#### **1.1 RAW MILK PRODUCTION**

1.1.1 Dairy Cattle Inventory Down for First Time since 1998

1.1.2 Raw Milk Output Witnessed Negative Growth for First Time since 1998

#### **1.2 DAIRY PROCESSING**

1.2.1 Liquid Milk Output Almost Zero Growth

1.2.2 Solid Dairy Output Saw Negative Growth for First Time since 2000

#### **1.3 DAIRY TRADE**

1.3.1 Dairy Import on Conspicuous Upward Slope

1.3.2 Ups-and-Downs of Dairy Export

#### **1.4 DAIRY CONSUMPTION**

1.4.1 Per Capita Milk Possession Volume Witnessed Negative Growth for First Time in One Decade

1.4.2 Urban Per Capita Dairy Consumption on Slide

#### **1.5 PRICE OF DAIRY PRODUCTS**

#### **1.6 DAIRY INDUSTRIAL DEVELOPMENT**

#### **1.7 DAIRY INDUSTRIAL INTEGRATION**

#### **1.8 POLICIES FOR THE DAIRY INDUSTRY**

### **CHAPTER 2 ANALYSIS OF THE POLICY ENVIRONMENT FOR CHINA'S DAIRY INDUSTRY IN 2008**

#### **2.1 RELEVANT POLICIES**

#### **2.2 MARKET ENTRY CONDITIONS FOR DAIRY INDUSTRY**

2.2.1 Background of the Policy

2.2.2 Main Contents

2.2.3 Impact on Domestic Dairy Industry

#### **2.3 INDUSTRIAL POLICIES FOR THE DAIRY INDUSTRY**

2.3.1 Background of the Policy

2.3.2 Main Contents

2.3.3 Influence on the Development of Dairy Industry

#### **2.4 "REGULATIONS FOR MANAGEMENT OF SUPERVISION OVER QUALITY AND SAFETY OF DAIRY PRODUCTS, I.E. DECREE NO. 536 OF THE STATE COUNCIL**

2.4.1 Background Information

2.4.2 Main Contents

2.4.3 Impact on Dairy Industry

## 2.5 PROGRAM FOR RECTIFICATION AND REVITALIZATION OF DAIRY INDUSTRY

### 2.5.1 Background

### 2.5.2 Main Contents

### 2.5.3 Impact on Dairy Industry

## 2.6 FORMULATION OF OTHER POLICIES

### 2.6.1 Regulating raw milk purchase price

### 2.6.2 Management Methods for Interest Rate Discounted Raw Milk Purchase Loans with Subsidies from Central Government

### 2.6.3 Abolition of Policy on Exemption of Inspection for Famous Brand Products

### 2.6.4 Maximum Limit of Melamine and Regulations on Testing Methods

### 2.6.5 Relevant provisions for application of essence in baby's formula and cereal foods

## **CHAPTER 3 MELAMINE INCIDENT AND ITS IMPACT ON CHINA'S DAIRY INDUSTRY**

### 3.1 RECOUNTING THE MELAMINE INCIDENT

### 3.2 IMPACT OF MELAMINE INCIDENT ON RAW MILK PRODUCTION

#### 3.2.1 New Trend

### 3.3 IMPACT FROM MELAMINE INCIDENT ON DAIRY ENTERPRISES

#### 3.3.1 Negative Impact on Dairy Enterprises

#### 3.3.2 Influence on Foreign-Funded Dairy Enterprises

### 3.4 IMPACT FROM MELAMINE INCIDENT ON DAIRY CONSUMPTION

### 3.5 IMPACT ON DAIRY TRADE FROM THE MELAMINE INCIDENT

#### 3.5.1 Difficulties for Dairy Export

#### 3.5.2 Dairy Import to See Further Expansion

### 3.6 IMPACT FROM MELAMINE INCIDENT ON INDUSTRIAL COMPETITION

### 3.7 IMPACT ON DAIRY POLICIES FROM MELAMINE INCIDENT

## **CHAPTER 4 ANALYSIS OF DAIRY PRODUCTION IN 2008**

### 4.1 PRODUCTION OF RAW MILK

#### 4.1.1 Overall Trend

#### 4.1.2 Dairy Cattle Inventory

#### 4.1.3 Raw Milk Output

#### 4.1.4 Distribution of Milk Supply Regions

#### 4.1.5 Purchase Price of Raw Milk

### 4.2 DAIRY PRODUCTION

#### 4.2.1 Liquid Milk

#### 4.2.2 Solid Dairy Products

4.2.3 Powder Output

4.2.4 OUTPUT OF OTHER SOLID DAIRY PRODUCTS

## **CHAPTER 5 ANALYSIS OF DAIRY TRADE IN 2008**

### **5.1 IMPORT ANALYSIS**

5.1.1 General Situation Analysis

5.1.2 Import Structure

### **5.2 MILK POWDER IMPORT ANALYSIS**

5.2.1 Import Volume

5.2.2 Import Structure

5.2.3 Source of Import

5.2.4 Destination of Import

5.2.4 Importation Price

### **5.3 WHEY IMPORT ANALYSIS**

5.3.1 Import Volume

5.3.2 Origin of Import

5.3.3 Destination of Import

5.3.4 Importation Price

### **5.4 ANALYSIS OF IMPORT OF MILK FAT**

5.4.1 Import Volume

5.4.2 Origin of Import

5.4.3 Importation Price

### **5.5 CHEESE IMPORT ANALYSIS**

5.5.1 Import Volume

5.5.2 Origin of Import

5.5.3 Importation Price

### **5.6 ANALYSIS OF IMPORT OF FRESH MILK & CREAM**

5.6.1 Import Volume

5.6.2 Import Origin

5.6.3 Importation Price

### **5.7 YOGHURT IMPORT ANALYSIS**

5.7.1 Quantitative Analysis of Import

5.7.2 Origin of Import

5.7.3 Analysis of Import Prices

### **5.8 DAIRY EXPORT ANALYSIS**

5.8.1 Overall Situation

5.8.2 Export Structure of Dairy Products

5.8.3 Fresh Milk Export

#### 5.8.4 Export of Powder

### **CHAPTER 6 ANALYSIS OF DAIRY CONSUMPTION IN 2008**

#### 6.1 OVERALL DAIRY CONSUMPTION

#### 6.2 STRUCTURE OF DAIRY CONSUMPTION OF URBAN RESIDENTS

#### 6.3 REGIONAL FEATURES OF URBAN DAIRY CONSUMPTION

#### 6.4 RETAIL PRICE OF DAIRY PRODUCTS

##### 6.4.1 Fresh Milk Price

##### 6.4.2 Yoghurt Price

##### 6.4.3 Powder Price

##### 6.4.4 Lactose Price

##### 6.4.5 Price of White Sugar

##### 6.4.6 Feed Price

### **CHAPTER 7 ANALYSIS OF COMPETITIONS OF CHINA'S DAIRY MARKET IN 2008**

#### 7.1 CHARACTERISTICS OF MARKET COMPETITION

#### 7.2 COMPETITIONS OF RAW MILK MARKET

#### 7.3 COMPETITION OF POWDER MARKET

##### 7.3.1 the Environment of the Powder Market

##### 7.3.2 Market Shares of Main Competing Enterprises

#### 7.4 COMPETITIONS OF LIQUID MILK MARKET

##### 7.4.1 Ordinary Plain Milk

##### 7.4.2 7.4.2 Top-End UHT Milk

##### 7.4.3 Acid Lactic Drinks

##### 7.4.4 Functional Milk

### **CHAPTER 8 ANALYSIS OF MAIN DAIRY ENTERPRISES IN 2008**

#### 8.1 YILI

##### 8.1.1 Business Revenue

##### 8.1.2 Market Competitiveness

##### 8.1.3 Impacts from Olympic Games and Melamine Incident

##### 8.1.4 Prospect of Yili

#### 8.2 MENGNIU

##### 8.2.1 Business Revenue

##### 8.2.2 Market Competitiveness

##### 8.2.3 Impacts from Melamine Incident

#### 8.2.4 Estimate of Revenue

### 8.3 BRIGHT DAIRY

#### 8.3.1 Business Revenue

#### 8.3.2 Market Competitiveness

#### 8.3.3 Impacts from Melamine Incident

#### 8.3.4 Prospect of Bright Dairy

### 8.4 SANLU

#### 8.4.1 Impacts from Melamine Incident

#### 8.4.2 Merger of Sanlu and Restructuring of Sub Companies

#### 8.4.3 Inspiration from Sanlu to Dairy Industry

### 8.5 SANYUAN

#### 8.5.1 Business Revenue

#### 8.5.2 Market Competitiveness

#### 8.5.3 Opportunities and Challenges to Sanyuan from Melamine Incident

#### 8.5.4 Prospect of Sanyuan

### 8.6 WANDERSUN

#### 8.6.1 Business Revenue

#### 8.6.2 Market Competitiveness

#### 8.6.3 Opportunity from Melamine Incident

#### 8.6.4 Prospect of Wandersun

### 8.7 YINQIAO

#### 8.7.1 Analysis of Business Performance

#### 8.7.2 Market Competitiveness

#### 8.7.3 Impact from Melamine Incident

#### 8.7.4 Prospect of Yinqiao

### 8.8 NEW HOPE DAIRY

#### 8.8.1 Analysis of Business Performance

#### 8.8.2 Market Competitiveness of New Hope Dairy

#### 8.8.3 Impacts on New Hope Dairy from Melamine Incident

#### 8.8.4 Prospect of New Hope Dairy

### 8.9 NESTLE

#### 8.9.1 Business Revenue

#### 8.9.2 Impacts from Melamine Incident

#### 8.9.3 Prospect of Nestle

### 8.10 DUMEX

#### 8.10.1 Business Revenue

#### 8.10.2 Impacts from Melamine Incident

#### 8.10.3 Prospect of Dumex

## **CHAPTER 9 ANALYSIS OF ENTERPRISES OF PACKAGING MATERIALS FOR DAIRY PRODUCTS IN 2008**

### **9.1 TETRA PAK IN CHINA**

#### **9.1.1 Business Activities**

#### **9.1.2 PR Activities**

#### **9.1.3 Tetra Pak and “Anti-Monopoly Law” in China**

### **9.2 IMPACTS ON BUSINESS REVENUE FROM MELAMINE INCIDENT**

### **9.3 PROSPECT OF TETRA PAK IN CHINA IN 2009**

## **CHAPTER 10 ANALYSIS OF DAIRY INDUSTRIAL DEVELOPMENT IN 2008**

### **10.1 OVERALL STATUS**

### **10.2 OPERATIONAL ABILITY**

## **CHAPTER 11 ANALYSIS OF WORLD DAIRY MARKET STATUS IN 2008**

### **11.1 WORLD DAIRY MARKET IN 2008**

#### **11.1.1 Overall Momentum of World Dairy Market**

#### **11.1.2 Production of Milk and Dairy Products**

#### **11.1.3 Dairy Trade**

#### **11.1.4 World Price of Dairy Products**

### **11.2 ANALYSIS OF DAIRY MARKET STATUS OF MAIN DAIRY PRODUCING COUNTRIES IN 2008**

#### **11.2.1 New Zealand**

#### **11.2.2 Australia**

#### **11.2.3 USA**

#### **11.2.4 EU**

#### **11.2.5 India**

## **CHAPTER 12 OUTLOOK OF CHINA’S DAIRY INDUSTRY IN 2009**

### **12.1 EXECUTIVE SUMMARY**

### **1.2 RAW MILK PRODUCTION**

#### **12.2.1 Dairy Cattle Inventory**

#### **12.2.2 Milk Production**

#### **12.2.3 Layout of Raw Milk**

### **12.3 DAIRY PROCESSING**

#### **12.3.1 Main Dairy Products**



12.3.2 Other Dairy Products

12.3.3 Marginal Dairy Products

12.4 DAIRY TRADE PREDICTIONS

12.4.1 Import

12.4.2 Export

12.5 PREDICTION OF PRICE TREND OF RAW MILK AND DAIRY PRODUCTS

12.5.1 Raw Milk Price

12.5.2 Price Level of Dairy Products

12.6 FORECAST OF DAIRY CONSUMPTION

12.7 PREDICTION OF THE PATTERN OF COMPETITION OF DAIRY PRODUCTS

## **ANNEX**

ANNEX I: BALANCE SHEET OF RAW MILK OF CHINA, 2007-2009

ANNEX II: BALANCE SHEET OF WHOLE MILK POWDER OF CHINA, 2007-2009

## Figures

### FIGURES & TABLES

FIGURE 1-1 DAIRY CATTLE INVENTORY GROWTH TREND, 1997-2008

FIGURE 1-2 OVERALL GROWTH OF MILK OUTPUT, 1997-2008

FIGURE 1-3 CHINA LIQUID PRODUCTION TREND, 2000-2008

FIGURE 1-4 TREND OF THE OUTPUT OF SOLID DAIRY PRODUCTS IN CHINA, 2000-2008

FIGURE 1-5 CHINA DAIRY PRODUCTS IMPORTATION TREND, BY MONTH, 2004-2008

TABLE 1-1 CHINA DAIRY PRODUCT EXPORTS, 2006-2008

FIGURE 1-6 GROWTH TREND OF PER CAPITA MILK POSSESSION VOLUME, 1992-2008

FIGURE 1-7 TREND OF URBAN PER CAPITA DAIRY CONSUMPTION, 1992-2008

TABLE 1-2 AVERAGE QUARTERLY URBAN RETAIL PRICE OF DAIRY PRODUCTS IN CHINA, 2005-2008

TABLE 1-3 INCREASE IN AVERAGE RETAIL PRICE IN URBAN MARKET, BY QUARTER, 2007-2008

TABLE 1-4 CHINA DAIRY INDUSTRY DEVELOPMENT ECONOMIC INDEX, 2002-2008

FIGURE 4-1 DAIRY CATTLE INVENTORY GROWTH, 1997-2008

TABLE 4-1 TOTAL OUTPUT OF RAW MILK AND COW MILK AND GROWTH, 1996-2008

FIGURE 4-2 CHANGES OF DAIRY CATTLE INVENTORY OF DIFFERENT PROVINCES, 2008

FIGURE 4-3 STATUS OF MAIN DAIRY FARMING PROVINCES IN THE NATION, 2008

FIGURE 4-4 MILK OUTPUT OF DIFFERENT PROVINCES, 2008

FIGURE 4-5 STATUS OF MILK OUTPUT MAIN PRODUCING PROVINCES IN CHINA, 2008

FIGURE 4-6 CHANGES OF RAW MILK PURCHASE PRICES ACROSS PROVINCES, 2006-2008

TABLE 4-2 RAW MILK PRICE IN MAIN PRODUCING REGIONS, 2006-2008

FIGURE 4-7 LIQUID MILK OUTPUT AND ITS TREND, 2000-2008

FIGURE 4-8 LIQUID MILK OUTPUT AND ITS TREND, BY MONTH, 2000-2008

FIGURE 4-9 SHARE OF LIQUID MILK OUTPUT OF MAIN PRODUCING PROVINCES IN CHINA, 2008

FIGURE 4-10 COMPARISON OF LIQUID MILK OUTPUT OF PROVINCES, 2008

FIGURE 4-11 LIQUID MILK COMPOSITION, 2000-2008

FIGURE 4-12 UHT MILK OUTPUT AND GROWTH RATE, 2001-2008

FIGURE 4-13 PASTEURIZED MILK OUTPUT AND GROWTH RATE, 2001-2008

FIGURE 4-14 YOGHURT OUTPUT AND GROWTH RATE, 2001-2008

FIGURE 4-15 TREND OF THE OUTPUT OF SOLID DAIRY PRODUCTS, 1997-2008

FIGURE 4-16 TREND OF THE OUTPUT OF SOLID DAIRY PRODUCTS BY MONTH, 2006-2008

FIGURE 4-18 OUTPUT OF SOLID DAIRY PRODUCTS BY REGION IN CHINA, 1998-2007

FIGURE 4-19 OUTPUT OF SOLID DAIRY PRODUCTS OF MAJOR PROVINCES, 2003-2008

FIGURE 4-20 TREND OF OUTPUT OF SOLID DAIRY PRODUCTS BY KEY PROVINCES AS A PROPORTION OF THE NATIONAL TOTAL, 2003-2008

FIGURE 4-21 OUTPUT OF SOLID DAIRY PRODUCTS BY KEY PROVINCES AS A PROPORTION OF THE NATIONAL TOTAL, 2008

FIGURE 4-22 TREND OF POWDER PRODUCTION, 1991-2008

FIGURE 4-23 TREND OF WMP PRODUCTION, 1999-2008

FIGURE 4-24 TREND OF SMP PRODUCTION, 1999-2008

FIGURE 4-25 POWDER OUTPUT STRUCTURE (UNIT: 000 TONS), 2008

TABLE 5-1 CHINA DAIRY PRODUCT IMPORTS, 2006-2008

TABLE 5-2 CHANGE OF IMPORT STRUCTURE OF DAIRY PRODUCTS, BY QUANTITY, 2007-2008

FIGURE 5-1 TREND OF MONTHLY IMPORT OF SMP, 2005-2008

FIGURE 5-2 TREND OF IMPORT OF LIGHT WHOLE POWDER, BY MONTH, 2005-2008

FIGURE 5-3 TREND OF IMPORT OF WMP (SUGAR- ADDED) BY MONTH, 2005-2008

FIGURE 5-4 CHANGES OF STRUCTURE OF POWDER IMPORT (QUANTITY), 2003-2008

TABLE 5-3 ORIGIN OF POWDER IMPORT AND CHANGES, BY QUANTITY, 2007-2008

FIGURE 5-5 DESTINATION OF IMPORTED SKIMMED POWDER (QUANTITY), 2008

FIGURE 5-6 DESTINATION OF IMPORTED LIGHT WHOLE POWDER (QUANTITY), 2008

FIGURE 5-7 DESTINATION OF IMPORTED SWEET WHOLE POWDER (QUANTITY), 2008

FIGURE 5-8 CIF PRICE OF SKIMMED POWDER TO CHINA, BY MONTH, 2003-2008

FIGURE 5-9 CIF PRICE OF LIGHT WHOLE POWDER TO CHINA, BY MONTH, 2003-2008

TABLE 5-4 CHANGES OF INTERNET AUCTION PRICE OF WMP OF FONTERRA, 2008-2009

FIGURE 5-10 TREND OF WHEY IMPORT, BY MONTH, 2003-2008

TABLE 5-5 CHANGES OF IMPORT ORIGIN OF WHEY AND SHARE IN TOTAL IMPORT, 2007-2008

TABLE 5-6 DESTINATION OF IMPORTED WHEY (IMPORT VOLUME), 2007-2008

FIGURE 5-11 CIF PRICE OF WHEY TO CHINA, BY MONTH, 2003-2008

FIGURE 5-12 TREND OF IMPORT OF BUTTER AND ANHYDROUS BUTTER OIL (QUANTITY), BY MONTH, 2004-2008

FIGURE 5-13 CHANGES OF ORIGIN OF MILK FAT IMPORT, 2003-2008

FIGURE 5-14 CIF PRICE OF BUTTER AND ANHYDROUS BUTTER OIL TO CHINA, 2004-2008

FIGURE 5-15 TREND OF CHEESE IMPORT, BY QUANTITY, 2004-2008

TABLE 5-16 ORIGIN OF CHEESE IMPORT, 2008

FIGURE 5-16 TREND OF CIF PRICE OF CHEESE TO CHINA, 2004-2008

FIGURE 5-17 TREND OF IMPORT OF FRESH MILK & CREAM, BY QUANTITY, 2004-2008

FIGURE 5-18 MAIN SUPPLIERS OF FRESH MILK & CREAM TO CHINA, 2008

FIGURE 5-19 TREND OF CIF PRICE OF FRESH DAIRY PRODUCTS TO CHINA, BY MONTH, 2004-2008

FIGURE 5-20 TREND OF YOGHURT IMPORT (QUANTITY), 2004-2008

FIGURE 5-21 ORIGIN OF YOGHURT IMPORT, 2008

FIGURE 5-22 TREND OF CIF PRICE OF YOGURT TO CHINA, BY MONTH, 2004-2008

TABLE 5-7 CHINA DAIRY PRODUCTS EXPORT, 2008

FIGURE 5-23 STRUCTURE OF DAIRY EXPORT (QUANTITY), JANUARY TO OCTOBER, 2008

FIGURE 5-24 TREND OF EXPORT OF FRESH DAIRY PRODUCTS, BY MONTH, 2007-2008

TABLE 5-8 COMPARISON OF IMPORT AND EXPORT PRICES FOR FRESH MILK, 2007-2008

FIGURE 5-25 TREND OF EXPORT OF POWDER, BY MONTH, 2007-2008

TABLE 5-9 DIFFERENCE BETWEEN EXPORTATION AND IMPORTATION PRICES OF POWDER, 2007-2008

TABLE 5-10 DESTINATIONS OF LIGHT WHOLE POWDER FROM CHINA, 2008

TABLE 6-1 PERCAPITA DAIRY POSSESSION VOLUME OF CHINESE RESIDENTS AND FORECAST, 1992-2008

TABLE 6-2 PER CAPITA DAIRY CONSUMPTION VOLUME OF URBAN RESIDENTS, 1992-2008

TABLE 6-3 QUARTERLY CHANGES OF PER CAPITA DAIRY CONSUMPTION OF URBAN RESIDENTS, 2006-2008

FIGURE 6-1 PER CAPITA MILK AND DAIRY CONSUMPTION OF RURAL RESIDENT,  
1992-2008

FIGURE 6-2 QUARTERLY STRUCTURE OF DAIRY CONSUMPTION OF URBAN  
RESIDENTS, BY VOLUME, 2005-2008

FIGURE 6-3 QUARTERLY STRUCTURE OF DAIRY CONSUMPTION OF URBAN  
RESIDENT, BY VALUE, 2005-2008

TABLE 6-4 CHANGES OF PER CAPITA DAIRY CONSUMPTION (TOTAL) OF URBAN  
RESIDENTS OF DIFFERENT PROVINCES, 2006-2008

TABLE 6-5 CHANGES OF PER CAPITA FRESH MILK CONSUMPTION (TOTAL) OF  
URBAN RESIDENTS OF DIFFERENT PROVINCES, 2006-2008

TABLE 6-6 CHANGES OF PER CAPITA YOGURT CONSUMPTION (TOTAL) OF  
URBAN RESIDENTS OF DIFFERENT PROVINCES, 2006-2008

TABLE 6-7 CHANGES OF PER CAPITA POWDER CONSUMPTION (TOTAL) OF  
URBAN RESIDENTS OF DIFFERENT PROVINCES, 2006-2008

TABLE 6-8 QUARTERLY AVERAGE RETAIL PRICE OF DAIRY PRODUCTS OF  
URBAN MARKETS, 2005-2008

TABLE 6-9 QUARTERLY GROWTH OF AVERAGE RETAIL PRICE OF DAIRY  
PRODUCTS OF URBAN MARKET, 2007-2008

FIGURE 6-4 CIF PRICE OF LACTOSE TO CHINA, BY MONTH, 2005-2008

FIGURE 6-5 SPOT PRICE OF WHITE SUGAR IN PRODUCING AND CONSUMING  
REGIONS, BY MONTH, 1998-2008

FIGURE 6-6 TREND OF AVERAGE SPOT PRICE OF CORN OF VARIOUS PLACES,  
2006-2008

FIGURE 6-7 TREND OF MONTHLY AVERAGE SPOT PRICE OF SOYMEAL OF  
VARIOUS PLACES, 2006-2008

FIGURE 6-8 TREND OF MONTHLY AVERAGE PRICE OF WHEAT BRAN OF  
VARIOUS PLACES, 2006-2008

FIGURE 7-1 MARKET SHARES FOR MAIN PRODUCERS OF POWDER IN CHINA,  
BY VOLUME, 2008

FIGURE 7-2 CHANGES OF MARKET SHARE OF ORDINARY PLAIN MILK, WEEK 1 -  
39, 2008

FIGURE 7-3 CHANGES OF MARKET SHARES OF TOP-GRADE UHT MILK BRANDS,  
WEEK 1-39 OF 2008

FIGURE 7-4 CHANGES OF MARKET SHARE OF ACID LACTIC DRINKS BRANDS,  
WEEK 1-39, 2008

FIGURE 7-5 CHANGES OF MARKET SHARE OF BRANDS OF FUNCTIONAL MILK,  
WEEK 1-39, 2008

TABLE 8-1 OPERATION OF YILI, FIRST HALF OF 2008

TABLE 8-2 OPERATION OF YILI, THIRD QUARTER OF 2008

TABLE 8-3 YILI REVENUE, FOR THE FIRST THREE QUARTERS IN 2008
TABLE 8-4 INVESTED PROJECTS OF YILI FROM RAISED FUND, FIRST HALF OF 2008
TABLE 8-5 INVESTED PROJECTS OF YILI FROM NON-RAISED FUND, 1ST HALF OF 2008
FIGURE 8-1 MONTHLY STOCK PRICE OF YILI, 2007-2008
TABLE 8-6 FORCAST ON OPERATION OF YILI, 2008
TABLE 8-7 OPERATIONAL STATUS OF MENGNIU, FIRST HALF OF 2008
FIGURE 8-2 PRODUCT COMPOSITION OF MENGNIU, BY SALES VALUE, 1ST HALF OF 2008
TABLE 8-8 ECONOMIC EFFICIENCY OF MENGNIU, FIRST HALF OF 2008
FIGURE 8-3 TREND OF MENGNIU STOCK PRICE, 2007-2008
TABLE 8-9 OPERATIONAL STATUS OF BRIGHT, FIRST HALF OF 2008
TABLE 8-10 ECONOMIC EFFICIENCY OF BRIGHT, 3RD QUARTER OF 2008
TABLE 8-11 OPERATIONAL STATUS OF BRIGHT, FIRST THREE QUARTERS OF 2008
FIGURE 8-5 MONTHLY TREND OF STOCK PRICE OF BRIGHT DAIRY, 2007-2008
TABLE 8-12 OPERATIONAL STATUS OF DAIRY SECTOR OF SANYUAN, FIRST HALF OF 2008
TABLE 8-13 GROWTH OF REVENUE OF DAIRY SECTOR FROM DIFFERENT REGIONS OF SANYUAN, FIRST HALF OF 2008
TABLE 8-14 OPERATIONAL STATUS OF DAIRY SECTOR OF SANYUAN, THIRD QUARTER OF 2008
TABLE 8-15 OPERATIONAL STATUS OF DAIRY SECTOR OF SANYUAN, FIRST THREE QUARTERS OF 2008
FIGURE 8-6 MONTHLY TREND OF STOCK PRICE OF SANYUAN, 2007-2008
TABLE 8-16 PRODUCTION OF DAIRY PRODUCTS OF WANDERSUN, 2008
TABLE 8-17 PRODUCTION OF DAIRY PRODUCTS OF YINQIAO, 2007-2008
TABLE 8-18 REVENUE OF CORE SECTOR OF NEW HOPE, FIRST HALF OF 2008
TABLE 8-19 REVENUE OF DAIRY SECTOR OF NEW HOPE, THIRD QUARTER OF 2008
TABLE 8-20 REVENUE OF DAIRY SECTOR OF NEW HOPE, FIRST THREE QUARTERS OF 2008
TABLE 9-1 INDICATORS OF DAIRY INDUSTRIAL DEVELOPMENT, 2002-2008
TABLE 9-2 ASSET MANAGEMENT RATIO OF DAIRY INDUSTRY, 2002-2008
FIGURE 11-1 MONTHLY AVERAGE DAIRY PRICE (FOB) OF NEW ZEALAND (NZ\$/KG), MAY 2006 - JULY 2008
TABLE 11-1 TREND OF DAIRY CATTLE INVENTORY OF MAIN COUNTRIES, 2001-2008

TABLE 10-2 TREND OF COW MILK PRODUCTION OF MAIN COUNTRIES,  
2001-2008

FIGURE 11-1 PROPORTION OF LIQUID MILK CONSUMPTION IN MILK  
PRODUCTION OF MAIN COUNTRIES AND REGIONS, 2008

TABLE 11-3 PRODUCTION AND TRADE OF WHOLE POWDER OF MAIN  
COUNTRIES, 2007-2008

TABLE 11-4 PRODUCTION AND TRADE OF SKIMMED POWDER OF MAIN  
COUNTRIES, 2007-2008

TABLE 11-5 PRODUCTION AND TRADE OF BUTTER AND GHEE OF MAIN  
COUNTRIES, 2007-2008

TABLE 11-6 PRODUCTION AND TRADE OF CHEESE OF MAIN COUNTRIES,  
2007-2008

TABLE 11-7 BALANCE SHEET OF RAW MILK OF NEW ZEALAND, 2007-2009

TABLE 11-8 BALANCE SHEET OF BUTTER OF NEW ZEALAND, 2007-2009

TABLE 11-9 EXPORT OF BUTTER FROM NEW ZEALAND (HS040510), BY  
COUNTRY, 2005-2008

TABLE 11-10 EXPORT OF ANHYDROUS BUTTER OIL FROM NEW ZEALAND (AMF)  
(HS040590), BY COUNTRY, 2005-2008

TABLE 11-11 BALANCE SHEET OF BUTTER OF NEW ZEALAND, 2007-2009

FIGURE 11-2 TREND OF CHEESE EXPORTS FROM NEW ZEALAND (TONS),  
1992-2008

TABLE 11-12 EXPORT OF CHEESE AND CURD FROM NEW ZEALAND (HS0406),  
BY COUNTRY, 2005-2008 MARKET YEAR

TABLE 11-13 BALANCE SHEET OF SKIMMED MILK POWDER OF NEW ZEALAND,  
2007-2009

TABLE 11-14 EXPORT OF SKIMMED POWDER (HS040210) FROM NEW ZEALAND,  
BY COUNTRY, 2005-2008

TABLE 11-15 BALANCE SHEET OF WHOLE POWDER OF NEW ZEALAND,  
2007-2009

FIGURE 11-3 WMP & NFDM EXPORTS OF NEW ZEALAND, 1992-2008

TABLE 11-16 EXPORT OF WHOLE POWDER FROM NEW ZEALAND (HS040221),  
BY COUNTRY, 2005-2008

FIGURE 11-5 TREND OF DAIRY PRICE (US\$/TON) OF NEW ZEALAND, 1994-2008

FIGURE 11-6 MONTHLY AVERAGE DAIRY PRICE (FOB) (NZ\$/KG) OF NEW  
ZEALAND, MAY 2006-JULY 2008

TABLE 11-17 BALANCE SHEET OF RAW MILK OF AUSTRALIA, 2007-2009

TABLE 10-18 BALANCE SHEET OF BUTTER OF AUSTRALIA, 2007-2009

FIGURE 11-7 TREND OF PRODUCTION AND EXPORT OF CHEESE BY  
AUSTRALIA, 98/99-07/08



TABLE 11-18 BALANCE SHEET OF CHEESE OF AUSTRALIA, 2007-2009  
TABLE 11-19 BALANCE SHEET OF SKIMMED MILK POWDER OF AUSTRALIA, 2007-2009  
TABLE 11-20 BALANCE SHEET OF WHOLE MILK POWDER OF AUSTRALIA, 2007-2009  
TABLE 11-21 DAIRY CATTLE INVENTORY AND MILK PRODUCTION IN USA, 2007-2008  
FIGURE 11-8 MONTHLY CHEESE PRODUCTION OF USA, 2005-2008  
FIGURE 11-9 CHEDDAR PRICE TREND OF USA, 2005-2008  
FIGURE 11-10 MONTHLY OUTPUT OF WHEY OF USA, 2005-2008  
FIGURE 11-11 MONTHLY TREND OF WHEY PRICE IN USA, 2005-2008  
FIGURE 11-12 MONTHLY OUTPUT OF SKIMMED POWDER (HUMAN) OF USA, 2005-2008  
FIGURE 11-13 PRICE TREND OF SKIMMED POWDER (HUMAN) OF USA, 2005-2008  
FIGURE 11-14 MONTHLY BUTTER PRODUCTION OF USA, 2005-2007  
FIGURE 11-15 MONTHLY BUTTER PRICE OF USA, 2005-2008  
FIGURE 11-16 EU INCOME OF MANUFACTURING OF CHEESE/WHEY POWDER, SMP/BUTTER AND WMP/BUTTER (IN EUR)  
TABLE 11-22 BALANCE SHEET OF RAW MILK OF EU 27 COUNTRIES, 2007-2009  
TABLE 11-23 BALANCE SHEET OF BUTTER FOR EU 27, 2007-2009  
TABLE 11-24 BALANCE SHEET OF CHEESE OF EU 27, 2006-2008  
TABLE 11-25 BALANCE SHEET OF WHOLE MILK POWDER OF EU 27, 2007-2009  
TABLE 11-26 BALANCE SHEET OF SKIMMED POWDER FOR 27 MEMBERS OF THE EU, 2007-2009  
TABLE 11-27 BALANCE SHEET OF RAW MILK IN INDIA, 2007-2009  
TABLE 11-28 BALANCE SHEET OF INDIAN SKIMMED POWDER, 2007-2009  
TABLE 11-29 BALANCE SHEET OF BUTTER IN INDIA, 2007-2009  
FIGURE 11-17 INDIA DAIRY EXPORTS: MY 2007/08 (MTONS)  
FIGURE 11-18 INDIAN EXPORT MARKET FOR DAIRY PRODUCTS (2006/07)



## I would like to order

Product name: China dairy market review & outlook 2008-2009 proposal

Product link: <https://marketpublishers.com/r/CC37880E9D2EN.html>

Price: US\$ 1,850.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/CC37880E9D2EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:  
Last name:  
Email:  
Company:  
Address:  
City:  
Zip code:  
Country:  
Tel:  
Fax:  
Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970