

China Feed Market Review & Outlook 2007-2008

Proposal

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Abstracts

Research Background

China's feed market experienced a hard time in 2007. Hog farms suffered a substantial reduction of hog inventory. Demand for Feed reduced largely and feedstuff price surged on a high level. Soymeal price even surpassed the highest level of RMB3,500/MT in 2004, resulting in more than 5,000 mid-small scale feed manufacturers suffering from stop production in China.

Affected by tense hog supply and surging hog purchasing price, numbers of large scale animal slaughtering and meat processing enterprises entered animal breeding and feed producing industry, causing a reduction of feed market share rate. Meanwhile, a drowsy feed demand and high feedstuff price casued a reduction of profit rate, even losses in feed industry. Therefore, large scale feed groups engaged in animal breeding to expand market share and increase integration system as to gain more profit and accelerate market distribution. While the cessation of small scale feed factoties provide more space for the promotion of large scale enterprises business, it is expected feed market in China will be carved up by large scale enterprises in 2008.

2007 is a milestone in Chinese feed industry. With the enlargement of animal breeding scale and long-term feedstuff price, product structure adjustment will be carried out in feed production, so output growth rate tend to be slowed down. In terms of feed varieties, formula feed and premixed feed increased proportion, while concentrated feed proportion reduced. In addition, corn feed supply tends to be strained on year-on-year basis, so farmers have enlarged utilization of non-regular feed, although which faced industrialization lag.

On the basis of livestock and poultry inventory and feedstuff in 2007, this study gives an in-depth analysis of demand, production and product structure in the feed industry in 2007 and an outlook of the feed market based on changes in breeding scale and feedstuff market in 2008, so as to provide a reliable reference to relevant enterprises in their decision-making.

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