

China feed market review & outlook 2008-2009 proposal

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Abstracts

Research Background

In 2008 China feed industry got great pressure from flat demand and waved feedstuff cost, causing large numbers of moderate and small scaled enterprises stopping production. And China breeding industry made losses in the second half year, so the whole industry is deteriorating.

In the external environment, labor cost increases among feed producers after the implementation of Labor Laws; low demand for livestock and meat products led to drowsy conditions in the whole industry chain. Meanwhile, extended scale of breeding houses severely weakened pricing capability, but it is favorable for the development of large-scaled feed producers. The market share of commercial feed is shrinking, especially in hog feed market, after slaughtering houses entering this industry and emerged integrating groups.

In the internal environment, some top feed companies have postponed listing in the stock market influenced by macro-economy. In the second half year, numbers of feed producers slowed down growing subject to short capital, but some large-scaled enterprises keep growing under foreign investment. The government strengthened the examination of feed producers after the Melamine Scandal, and some companies are disqualified.

It is predicted that demand for livestock products will keep low level in 2009, accordingly, feed industry will face great pressure. Therefore, the cost of feed stuff will be the key in next year's feed industry development.

This report analyzes processing, consumption, trade, price in China feed industry on the basis of macro-economy, feedstuff market and livestock farming industry. And feedstuff is our main research targets, such as corn, soymeal, fishmeal, meat & bone meal, lysine & methionine, etc. as to gain an integrated development of feed industry in 2008. Meanwhile, competition among domestic enterprises and effects of international market are also our research target, and there is also a forecast for the development trend of the Chinese feed industry in 2009. This report gives an integrated analysis on the effects of Melamine Scandal.

This report is a joint product of the experts of the Livestock and Feed Department, Beijing Orient Agribusiness Consultants Ltd.. These senior livestock and feed analysts also make advice for relevant departments and associations, and keep a beneficial relationship with major feed 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 feed investors, producers, material suppliers, equipment suppliers and research institutes both at home and abroad to understand the development trend of the feed industry, to make decisions on the positioning of the enterprise and to formulate development strategies.

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