

China Milk Powder Market Competition Situation Research Report



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Research Background and Purpose

Milk powder was the most important dairy product before the early half of 1990s. However, as Tetra Pak's aseptic filling products powering into Chinese dairy industry, UHT milk keeps a sustainable and speeding development with an annual average increasing rate of 89.37% between 1999 and 2004.

Thus, it promotes consumption pattern of Chinese dairy market to liquid milk as the main part from milk powder as the main part. Currently liquid milk takes up an absolutely main part of Chinese residents' dairy consumption, e.g., per capita dairy consumption of Chinese urban residents was 22.54 kilograms, in which liquid milk amounted to 22.04 kg (fresh liquid dairy products were 18.32 kg, and yogurt was 3.72 kg), and milk powder was only 0.50 kg.

In China, milk powder is usually divided into two categories by insiders, one category is packet milk powder which directly faces terminal market and takes up 60% of total amount of milk powder estimated by BOABC; while the other is industrial milk powder which is usually called big package milk powder and takes up 40% of the total amount in 2006. Industrial milk powder is compared with packet milk powder on terminal market, so there is no substantial difference between them. Because industrial milk powder is usually used as important raw material of dairy products (e.g., milk formula, restituted milk, yogurt, ice cream, etc.) and dairy food (e.g., bread, cake, biscuit, milk chocolate, dairy drinks, etc.), it is lower than packet milk powder in many aspects---deep-processing degree, technological level, packing form, packing material and so on.

According to China Dairy Industry Association, currently milk powder is the most important solid dairy product, which takes up more than 86% share of Chinese solid dairy products. There are several hundred milk powder processing enterprises on Chinese market with different scales and standards. In 2004, there were only 30 safe milk powder enterprises published by the State Bureau of Quality Supervision, which was less than one tenth of the total number. The concentration ratio of milk powder market is much lower than liquid milk market. In 2006, the production of the ten largest Chinese milk powder processing enterprises approximately takes up 53% of total amount of milk powder estimated by BOABC. A lot of changes happened to milk powder market. The Fuyang Inferior Quality Milk Powder Event in 2004 reduced the development of milk powder market that year. In the first half year of 2005, the event of exceed stipulated content of iodine of Nestle infants' milk powder had a bad effect on Nestlé's brand image and market sale. So it is still difficult to say how the milk powder market will make for.

At present, Chinese milk powder market presents increasing international characteristics. With the decline of import duty China keeps an interacted relation with major world trade economies, e.g., China is the second largest market for New Zealand exports, next to the US and the largest milk powder export market; China is one of the most important whey product markets for the US; EU is the most important supplier of non-fat milk powder and whey product for China. From this year, some related dairy policies and producing conditions happened in Oceania, the US and EU changed a lot, which has had or will have great influence on the imports of dairy products, including milk powder in China. From the perspective of export, Chinese milk powder export will have new opportunities, e.g., China entered free trade convention with the ASEAN with no duties on milk powder export to Southeastern Asia countries; China also reached free trade agreement with Chile, enjoying preferential policies on milk powder export. In addition, due to the reduction

of milk powder production and supply capacity in major export areas, the traditional markets provide a chance for Chinese milk powder export. However, in recent years, the RMB stayed firm against the dollar, which brought certain negative effect on China milk powder trade.

However, up till now, there has not a special research report of milk powder market in China. This report will do an overview analysis on China milk powder market on the following issues: analysis of raw milk supply, production and consumption of dairy products and milk powder, import and export of milk powder, supply and demand of milk powder environment of international market, policy environment of Chinese milk powder market, marketing environment of Chinese milk powder market, competition environment of Chinese milk powder market, etc. This report will forecast the trend of Chinese milk powder market. This report contains full and accurate cited statistics in recent years, in which there is especially much deeper division of milk powder statistics of the year 2006. Statistic resource in this report is authoritative, which includes first hand statistics gained from in-depth interviews with milk powder processing enterprises and sellers, and second hand statistics, e.g., China Custom, China Dairy Industry Association, Dairy Association of China, National Statistic Bureau, Ministry of Agriculture, All China Commercial Information Center, American Agriculture Ministry, FAO and so on. It is hoped that this report---as the first special research report of milk powder in China will help you in your work.

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