

Investment Report on China Beef Industry

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Abstracts

Research Background

With beef production above 7 million tons, China is the 3rd largest beef producer in the world; but backyard farms and manual slaughter units are main players of the industry. Large cattle farms with annual cattle crop higher than 100 heads only gain a market share of 11%, modern slaughterhouses' market share is only 13%. For beef products, Room Temperature Beef account for more than 80% of total beef production. In recent years, China breeder cow inventory kept declining due to poor earnings from breeder cow business, which will make China cattle inventory and beef production keep declining from 2008. China beef production will only recover in 2012.

In 2007, there were about 1000 cattle slaughterhouses in China with total capacity of 12 million heads per year and total beef production less than 1 million tons, which accounts for 20% of national beef cattle crop and 13% of national beef production respectively. The largest company only slaughtered 150 thousand heads in 2007.

Declining cattle inventory make public company -- Fucheng (Hebei)'s beef production fall by 18% in 2007, and other large beef companies also suffers with capacity utilization rate only 20%. Small companies will soon suspend production or exit the industry, which make integration opportunities for large companies. The largest beef company in China – Jilin Haoyue group planned to double its capacity to 1 million heads before 2010.

Because of serious meat quality problems of illegal cattle slaughter units, we predict China government will restrict small slaughterhouses and punish illegal slaughtering; in 2007 was issued by Hebei Provincial government and came into force from April 1st of the same year. In this Measure, qualification and quantity of cattle slaughterhouses in Hebei were confined. This was the first province-level regulation requiring cattle Appointed Slaughter; these measures all benefit large companies. By lobbying of large

companies, some areas like Heilongjiang province began to give subsidy for breeder cow farmers. Although low subsidy make the support policy is not so effective, it's still a good start toward more subsidies and we predict more areas will follow. These support policies will help recover breeder cow inventory.

In this report, BOABC comprehensively analyzes China beef consumption & Supply from 2000 to 2017. By combining value chain of beef industry and comparison with beef industry of US and Brazil, especially Brazil JBS group which became global largest beef processing company through frequent multinational acquisition, investment opportunities and investment value in China beef industry are concluded.

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