

Special Research Report on China's Dairy Farms

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Abstracts

Research Background

The occurrence of China's baby formula scandal has triggered the need for scaled dairy farming across the country. During the recent years, the State Council has kept on promulgating new policies in support of the scaled farming of dairy cattle. In September 2007, the State Council issued a document titled Opinions of the State Council on Promoting Sustained and Healthy Development of Dairy Industry (G.F.?2007?No. 31). The document says: "Efforts shall be stepped up to accelerate the scaled, intensive and standardized development of the farming sector by means of developing scaled farming neighborhoods (dairy farms) so as to gradually solve the problem of the dairy cattle farming being small and scattered. The agricultural authorities shall speed up efforts in formulating standards for scaled farming of dairy cattle, and the proportion of scaled dairy farming shall be increased remarkably by 2012." In November 2008, the Planning Outline for Regulating and Revitalizing the Dairy Industry was issued, which called for promoting the scaled and standardized dairy farming. The Outline pointed out, "Based on the existing investment for scaled dairy farming construction, the Central Government will further enhance investment supporting efforts within the central government budget, and support the major dairy cattle producing regions to accelerate standardized renovation of existing farms (farming neighborhoods) as well as the construction of new standardized farms (farming neighborhoods)." It was explicitly requested by the Outline that "By the end of October 2011, the scaled dairy farming shall be promoted to raise the proportion of scaled farms (farming neighborhoods) with inventory of 100 or above from the current level of less than 20% to about 30%." In July 2009, the Industrial Policies for the Dairy Products Industry and relevant policies were jointly promulgated by the National Development and Reform Commission (NDRC) and the Ministry of Industry and Information Technology (MIIT), which provide clear-cut support for dairy product processing enterprises to strengthen construction of their own raw milk bases and encourage them to construct scaled dairy farms (farming

neighborhoods) on their own or by means of equity participation. It was proposed in the No. 1 Central Document of 2010 that “the facility development of horticultural crops production and the scaled development of livestock farming and aquatic product cultivation shall be accelerated. The construction of live pig and dairy cattle farms and neighborhoods are supported.” In addition, the National Dairy Industry Development Plan (2009-2013) was jointly issued by the NDRC, the Ministry of Agriculture (MOA), the MIIT and Ministry of Commerce, which proposed the goal of “by 2013, the national inventory of dairy cattle shall reach 15 million heads, the dairy product output shall reach 48 million tons, the average yield level of adult cow shall be raised to 5.7 tons, and the proportion of scaled dairy farming with inventory above 100 shall reach 35%.” In 2011 and 2012, the NDRC and the MOA successively issued the Circular on Reporting Investment Plans for Standardized Scaled Farming Neighborhoods (Dairy Farms) Construction Projects and the Investment Plan Within the 2012 Central Government Budget for Standardized Scaled Farming Neighborhoods (Dairy Farms) Construction Projects, which provide overall subsidies and preferential taxation treatment for qualified farming neighborhoods, parks and pasture. Besides, tax incentives have been provided for scaled farming in many regions across the country, and government subsidies have been offered for pasture land and construction. Local governments have been active in launching industrial policies to aggressively push forward the construction of scaled pasture.

In China, detailed statistics and systematic analysis report on dairy farms have long since been unavailable and this Report is aimed to fill the research gap in this field. The Report elaborates on the status quo of scaled dairy farming and farms across China and of 15 major producing provinces and regions in a systematic manner. The Report covers the following aspects: development planning for the dairy industry and supportive policies, production of raw milk and changes in prices, technology and equipment of dairy farms, scaled dairy farming modes, economic benefits of dairy farming industry, survey in typical dairy farm production management as well as the assessment and judgment of future trends of China’s dairy farms.

The Report embodies the collective wisdom of the dairy industry research team of Beijing Orient Agribusiness Consultants Limited (BOABC). The senior dairy industry analysts of BOABC are members of think tanks of relevant government departments and associations and have maintained sound relationship with relevant government departments and associations. Meanwhile, the analysts have also kept sound relationship with national key dairy enterprises, affiliated industries and enterprises. Such resource advantages have brought invaluable professional support for the composition of this Report, and also guarantee the accuracy, authoritativeness,

scientificity and perspectiveness of the statistics quoted in this Report. The research team for this Report has also conducted a number of field surveys and investigations with the animal husbandry authorities, dairy farms and dairy product processing enterprises in different provinces and regions across the country. It is firmly believed by BOABC that this Report will be able to offer indispensable references for strategic decision making for dairy enterprises, dairy ingredient suppliers, relevant equipment suppliers as well as investment and financing institutions home and abroad.

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%li%Mengniu Dairy Group

%li%Yili Group

%li%Bright Dairy

%li%Modern Farming

%li%Shengmu High-technology

%li%Tianjin Jialihe

%li%Beijing Sanyuan Luhe

%li%Shenyang Huishan Dairy

%li%Heilongjiang Agricultural Reclamation

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