

# Research Report On Entry Into China's Dairy Market

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## Abstracts

China has begun its Open Policy in the 1980's, the milk industry has tremendous opportunities for the import of dairy products since then. The domestic and foreign milk companies in succession occupied the China's dairy product market. This has lead to increasing competition in the supply and distribution of milk products.

Based on competition in recent years, companies such as Mengniu, Yili, Sanlu, and Brightdairy, have taken the lead in this industry and dominated most of the domestic market. According to the National Statistic Bureau, the total sales of the large scaled manufacture of liquid milk and dairy products from January 2007 to November 2007 was about 118.871 billion RMB. This number has increased by 24.55% compared to last year's figure. The total value of the industry reached 121.144 billion RMB, which is 23.3% more than last year. The total profit was 6.438 billion RMB, which was about 24.37% higher. There were around 728 large scale companies and the number of employees numbered 207,000. About 174 business enterprises lost money, to the tune of 492 million RMB, which is 4.47% more or so.

The National Statistical Bureau figures suggest that urban and rural consumption has gone up slowly. In 2007 consumption was around 18.03 million tons, which is 21.18% more than the previous year. In 2006, the urban resident's average per capita expenditure on milk and dairy products was 150.23 RMB. This number climbed up by 8.38% from 2002 to 2006, and the composite growth increased by 9.57%. The rural resident's average per capita expenditure of milk and dairy products amounted to 3.15 kgs with an increase of 10.14%. The annual composite growth was about 28.52%, according to China's Dairy Industry Association. It is predicted that in the future, the consumption growth would continue to go up at the rate of 20%.

The import and export volume of China's dairy products has shown a marked increase in recent years. In 2007, the export figure was around 134.6 thousand tons, with an

increase of 79.66% to US 242 million dollars. And the import figure was 298.7 thousand tons with a decrease of 14.12%, and the import amount increased by 33.47% to US 745 million dollars.

New Zealand, America, France and Australia are the main sources of China's dairy products imports. From the aspect of the quantity of imports, China imported the largest number of dairy products in 2007 from New Zealand, America, France and Australia, with total amount of 229 thousand tons. This was about 76.69% of the total amount of China's import dairy products. The number of dairy products imported from New Zealand was 94.9 thousand tons, accounting for 31.78% of China's imports. The amount of dairy products imported from USA was 57.5 thousand tons, occupying 19.25 % of China's imports. The amount of dairy products imported from France and Australia were estimated at 50.8 thousand tons and 25.8 thousand tons respectively. France had 17.01%, and Australia had 8.65% of the total import of China.

The main types of imported dairy products are whey products and milk powder. These items accounted for 88.99% of the total imported dairy products. Other dairy products (such as butter, cheese, and condensed milk) took up a small proportion of 11.01% in the total imported amount. As for the import of dairy, other products have expanded in recent years from 5.33% in 2003 to 11.01%. In addition, with the rise in the income level of the consumers, the demand of such products will be further expanded and the profit margin will be much higher.

The dairy consumption market consists of a huge urban market and a burgeoning rural market. The market is becoming more sophisticated and is displaying the growing stage of maturity. As for the urban consumers, dairy products along with grain, meat, and seafood have become the basic staple diet. With the increase of consumption level, the future consumption of dairy products will reach a situation in which the number of consumers will increase. The average per capita level will improve every year, and the consumption demand will be diversified. This provides a flexible market and a great opportunity for the entry of imports. And, it will largely depend on product development, management of the brand, and the distribution channel. It is estimated that by the year 2010, the total consumption pattern of the urban inhabitants will increase to more than 21.5 million tons. And, the capacity of the domestic market would surpass 22.7 million tons.

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