

China Liquid Milk Industry Report, 2014-2017

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Abstracts

Driven by China's economic development, the improvement of people's living standards, the adjustment of dietary structure and many other positive factors, China's dairy product output and demand have increased significantly in recent years. In 2004-2013, China's dairy product output grew at a CAGR of 12.3%. Chinese dairy products are represented by liquid milk, whose output and retail sales reached 23.36 million tons (accounting for 86.6% of China's dairy product output) and RMB150.3 billion respectively in 2013. It is projected that China's liquid milk output and retail sales will hit 35.46 million tons and RMB219.9 billion separately in 2017.

Chinese liquid milk falls into high-end and ordinary liquid milk. High-end liquid milk includes Mengniu's Telunsu, Yili's Satine and Shuhua Milk, Bright Dairy & Food's UBEST and U+, Sanyuan's Extreme and special pure milk products. In recent years, China's demand for high-end liquid milk has been growing faster than ordinary milk apparently. In 2013, Chinese high-end liquid milk triggered retail sales of RMB43.4 billion, rising 25.4% year on year and occupying 28.9% of the total. In 2017, the retail sales of high-end liquid milk will jump to RMB70.6 billion, equivalent to 32.1% of the total.

At present, China liquid milk industry has formed an oligopolistic pattern, wherein Mengniu and Yili dominate half of the market. In 2013, Mengniu and Yili seized the respective share of 25.2% and 24.7% in the liquid milk market, followed by the third-ranked Bright Dairy & Food with 7.7%. Each of Yantang Dairy, Royal Dairy, Modern Farming and China Shengmu only obtained less than 1%.

Also, Chinese local liquid milk companies are trying to cooperate with foreign counterparts to solve milk source problems.

At the end of 2013, Yili and Italy's largest dairy producer - Sterilgarda Alimenti entered

into a strategic partnership. Under the agreement, Sterilgarda Alimenti produces UHT dairy products for Yili to help it expand high-end product lines. In April 2014, Bright Dairy & Food and Pactum Australia signed a processing agreement that the latter should process UHT milk for the former.

Given the favorable demand outlook for Chinese liquid milk, some multinational liquid milk companies have targeted at the Chinese market. In August 2013, New Zealand's dairy giant - Fonterra launched "Anchor" UHT milk. In November 2013, Japan's Meiji Dairies unveiled pasteurized milk and yogurt products in China. In February 2014, Italy's Centrale Latte Torino released UHT milk and soy-based beverage products in China.

The report includes the following aspects:

Status quo, market size, competition pattern, operation comparison among major enterprises, import and export of China liquid milk industry;

Policies, upstream, downstream and development forecast of China liquid milk industry;

Operation and liquid milk business of 13 Chinese liquid milk companies.

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