

China Edible Vegetable Oil Industry Report, 2013-2015

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Abstracts

In 2003-2012, China's refined edible vegetable oil production maintained an upward trend, reaching 51.7618 million tons in 2012, an increase of 19.5% compared with 2011, 3.4 times of the output in 2003, of which, soybean oil accounted for 52.2% of the total output; rapeseed oil and peanut oil 21.8% and 10.6%, respectively; maize oil, Oil-tea camellia seed oil and other small varieties of oil also witnessed relatively fast development.

As one of the world's most important importers of oilseeds and vegetable oil, China imported 9.6 million tons of vegetable oil and 62.28 million tons of oilseeds in 2012, both setting a record high. As the main imported oilseed, soybean accounted for 93.7% of the total imports of oilseeds; as the major imported edible oil, palm oil occupied 66.1% of the total imports of vegetable oil. At the same time, rapeseed oil and olive oil imports also showed fast growth, respectively up 210% and 25.9% YoY.

In 2012, Wilmar International reached revenue of \$45.46 billion, 46.7% of which came from the Chinese market. The subsidiary Yihai Kerry serves as one of China's largest grain and oil processing groups, with soybean market share above 10%, covering "Arowana", "Ingot" "Orchid" and other brands, of which, "Arowana" is the edible oil brand with the most complete oil varieties in China.

In 2012, COFCO presented oil processing capacity of 11.06 million tons / year, in possession of "Fulinmen", "Fuzhanggui", "Sihai", "Xiyingying", "Guhua" and other brands, with soybean oil market share of nearly 10%. Its edible oil business is mainly concentrated in China Agri-Industries Holdings Limited and China Foods Limited listed on HKEx. In the first half of 2013, China Agri-Industries Holdings Limited witnessed a year-on-year decline of 3.4% in net income, and China Foods Limited suffered a loss of 190 million Hong Kong dollars.

Compared with bulk oil companies, Chinese maize oil producers saw good operating conditions. In 2012, gross margins of Changshouhua Food and Xiwang Food reached 19.9% and 21.8%, respectively, well above the level of 8% of the edible oil industry.

China Edible Vegetable Oil Industry Report, 2013-2015 mainly covers the followings:

Policy environment, industrial standards, development planning, etc. for China's edible vegetable oil industry;

Development status, market supply and demand, import and export trade, price trend, etc. of edible vegetable oil industry in China;

Development status, market supply and demand, import and export trade, price trend, etc. of soybean oil, peanut oil, rapeseed oil, maize oil, olive oil and other oil varieties in China;

Operating status, investment and mergers, business analysis, development forecast, etc. of 16 major edible oil processing enterprises in China.

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