

China Infant Milk Powder Industry Overview, 2017-2021

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Abstracts

Description

Infant formula milk powder is the most significant food for infants.

After 30 years of development, there are more than 100 manufacturers and thousands of brands in China's infant milk powder industry. Market research by CRI shows that in 2015-2016, CR5 of sales revenues in China's infant milk powder industry is lower than 30%, far below the rate of 80%-90% in developed countries.

There are fierce competitions within China's infant milk powder industry. Many manufacturers use low-quality materials or add illegal ingredients to reduce costs, frequently causing safety events in the industry. To solve these problems, Chinese government is increasingly reinforcing regulations on the infant milk powder industry. For example, the new Food Safety Law and the Administrative Measures for the Registration of the Formulas of Infant Formula Milk Powder officially regulated the registration process in the infant milk powder industry and raised the barrier to entry of the industry. However, problems in the industry are difficult to be completely solved.

The output of infant milk powder fluctuated between 2011 and 2015 due to overcapacity in the industry and stricter policies. It dropped slightly in 2011 and 2012 before rising to over 500,000 tons in 2013. It decreased again in 2014 and 2015, ending with less than 500,000 tons in 2015.

The two important factors affecting demands for infant milk powder are the breastfeeding rate and the birth rate.

As China's economy grows, more Chinese women are joining the workforce, leading to a continuous decline in the rate of breastfeeding of 6-month-old infants in China. For example, the rate decreased from 67% in 1998 to 49% in 2004 and then to 27.8% in 2015. This is far below the world average (of 38%). Since Chinese government implemented the family planning policy more than three decades ago, China's birth rate has been declining. It remains at around 1.2% in recent years. During around 1985-1990, China's birth rate slightly rose and once peaked at 2.33% in 1987.

As people born during this period begin to raise children, China will see another peak in the birth rate. From 2013, the Chinese government began to loosen the family planning Policy. Article 18 of the new Family Planning Law, which became effective on January 1, 2016, states that the government encourages couples to have two children. The loosening of the family planning policy is conducive to the birth rate. More demand comes with more newborns each year for infant milk powder.

China imports large quantities of infant milk powder each year due to unstable quality control over domestic milk powder and its high prices. In 2015, China imported 175,972 tons, or USD 2,471 million of infant formula milk powder, increasing by 45% YOY and 59.5% YOY . The major import source is European Union which accounted for more than half of the total.

The remarkable increase in the volume of China's imported infant milk powder is firstly related to Chinese consumers' lack of confidence in domestic milk powder. Secondly, the rise of overseas shopping, especially cross-border shopping, makes it more convenient for consumers to purchase foreign milk powder. Thirdly, the general price of imported milk powder which is lower than that of domestic milk powder of the similar quality contributes to the sales of imported infant milk powder to some extent.

It is estimated that during 2017 to 2021, with the increasing number of newborns per year and the decreasing breastfeeding rate, Chinese market demand for infant formula milk powder will rise year by year, and so will the annual import of infant formula milk powder.

Readers Can Obtain the Following Information or More Through This Report:

Development Environment of China's Infant Milk Powder Industry

Supply and Demand of Infant Milk Powder in China

Market Competition of Infant Milk Powder in China

Import and Export of Infant Milk Powder in China

Major Infant Milk Powder Manufacturers in China and Their Operations

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