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Research Report on China Edible Vegetable Oil Industry, 2016-2020

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Abstracts

Description

With the increasing income per capita of Chinese people, the dietary structure changes significantly, which leads to a growing demand for edible vegetable oil. The output volume of China edible vegetable oil reached about 67.3 million tons increasing by about 3.1% YOY with the CAGR of about 15.4% from 2005 to 2015. Regardless of the double counting in refining and packaging processes of raw materials as well as the import, the actual consumption volume of edible vegetable oil was about 34 million tons in China in 2015.

Major shares are occupied by soybean oil, rapeseed oil, palm oil and peanut oil in edible vegetable oil market in China, of which the palm oil is mainly used for the food industry. Products with a small market share (e.g. corn oil and olive oil) account for an increasing share in China edible vegetable oil market in recent years. The major reason is that Chinese people consider these varieties are healthier.

As the revenues of planting oil crops are rather lower in China and a large amount of labor force moves from rural to urban areas, the output volume of oil crops can hardly increase at high speed. In recent years, the annual cultivated area of oil crops including soybeans is about over 20 million hectares while the annual output volume is less than 50 million tons. Oil crops needed in the production of vegetable oil of enterprises are largely dependent on import and this dependence ratio increases to over 60%. With the limited output volume of oil crops in China, increasing import is the major channel to meet the growing demand for vegetable oil.

The imported volume of edible vegetable oil was 6.76 million tons increasing by 4%

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YOY in China in 2015. In addition, China imports large amount of oil crops. In 2015, the import volume of soybeans was 81.7 million tons increasing by 14.6% YOY with an import value of USD 34.83 billion. Meanwhile, the annual import value of oil crops and vegetable oil exceeds USD 50 billion in China.

In China, there are tens of thousands of edible oil processing enterprises with an annual production capacity of over 200 million tons. However, major shares are occupied by top 10 enterprises of the edible vegetable oil market, including Yihai Kerry, COFCO Corporation and Chinatex Corporation.

Edible oil prices are slump due to the sufficient domestic oil supply, leading to lowering edible vegetable oil prices of oil processing enterprises for market shares from 2012. By the end of 2015, soybean oil, rapeseed oil and palm oil experienced the lowest prices in the past five years.

China edible vegetable oil industry is confronted with some problems in the development. For example: Whether transgenic soybean oil is harmful to the health? How can we completely prevent bad men from substituting vegetable oil with swill-cooked dirty oil to sell to consumers?

Cuisine styles such as decocting and frying are preferred in Chinese food. The consumption volume of edible vegetable oil will keep increasing for the growth of the economy and population in China. Oil crop planting enterprises and vegetable oil processing and trading ones around the world can find huge investment opportunities in China.

Through this report, readers can acquire the following information:

- Supply and Demand Status of Edible Vegetable Oil in China
- Economic and Policy Environment of Edible Vegetable Oil Industry in China
- Competition Status of Edible Vegetable Oil Market in China
- Analysis on Major Edible Vegetable Oil Varieties in China
- Import Status of Oil Crops and Edible Vegetable Oil in China
- Trend of Costs and Prices of Edible Vegetable Oil in China

Major Edible Vegetable Oil Processing Enterprises and Their Operation Status in China

Perspective of Edible Vegetable Oil Industry in China

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