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Research Report on China's Cattle Production Industry and Beef Market, 2012-2013

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Abstracts

Before reform and opening up, cattle were always treated as servant instead of meat. Chinese government actively encouraged peasants to feed cattle on straws not until the early 1990s in order to decrease straw waste and to promote the cyclic utilization of straws. As a result, the costs of feeding cattle declined and the passion of cattle farmers was stimulated. All of these promoted the rapid development of beef cattle industry and the development of beef cattle slaughtering industry and beef processing industry in China. In 2012, the output volume of beef totaled 6.623 million tons in China, increasing by 2.3% YOY.

The main cattle production model is the scattered model in China, which is quite different from large-scale cattle production models abroad. Due to its exacerbating grassland quality and insufficient grassland resources, China lacks the basic foundation of developing "modern grassland animal husbandry". Meanwhile, American-styled "industrialized large-scale animal husbandry" is not yet universal. In addition, China is a country with a large population and abundant cheap labor resources, so scattered cattle production model is the major cattle production model in China.

China beef cattle production turned from northwest pasturing areas to regions with agriculture economy advantages. As a result, it formed four beef cattle industrial zones in the Central Plains, the Northeast, the Northwest and the Southwest. According to the statistics yearbook of China animal husbandry, the national cattle stock volume was 104.592 million in 1991 and it increased to 126.983 million in 1999, which accounted for 10% of the global cattle stock volume in the same period. In 2011, the beef cattle stock volume was 107.78 million in China, increasing by 1.43% YOY.

In recent years, the cattle stock volume increases rapidly in China. The annual fattening

stock volume increased from the 13.039 million in 1991 to the 47.75 million in 2011, with the CAGR of 6.7%. Because of the rapid development of beef cattle slaughtering and processing industry in China, beef output volume increased from the 1.535 million tons in 1991 to the 6.623 million tons in 2012, with the CAGR of 7.2%. The beef output volume in China accounts for over 10% of the global beef output volume, so China was the third largest beef producer after the U.S. and Brazil. Meanwhile, its proportion of beef output volume in the total national meat output volume also increased from the 4.4% in 1991 to the 7.9% in 2012.

In 2012, China imported 124,246 bulls and the import volume has kept increasing since 2007. However, China mainly imports milk cows like Holstein from Australia, New Zealand and Uruguay. Beijing Be Green Import & Export Co., Ltd. is the largest cow importers with 22.82% market share.

In 2012, China imported 61,404.41 tons beef with the import value and the average import price of USD 254.6256 million and 4,146.70 USD/ton respectively. So China has become a net beef importer.

Because of the long production cycle and low reproductive rate of beef cattle, it is hard to increase the supply through adjusting the production scale. Along with the development of Chinese economy and the wide application of agricultural machinery, the labor value of cattle gradually disappeared and the supply system that based on traditional scattered production model almost collapsed. However, new large-scale cattle production models have not been established yet, so the situation of weak beef supply is hard to change in a short time. Along with the increasing income level and the changing eating habits of Chinese citizens (promotion of Western-style food and so on), the demand per capita for beef will increase greatly, which will aggravate the contradiction between the supply and demand in return. At present, the annual beef consumption per capita is less than 5 kilograms in China, which is less than half of the global per capita consumption level. Due to the increasing cattle production cost and insufficient beef supply in China beef market, beef price has been increasing in recent years.

It is predicted that both the price and import volume of beef will keep increasing in China in the coming years. As to cattle production enterprises, beef processing enterprises and beef import enterprises, there are many investment opportunities in beef cattle production industry and beef processing industry in China.

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