

Research Report on China's Edible Vegetable Oil Industry, 2018-2022

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Abstracts

Description

The global consumption of edible vegetable oils has been growing since 1991. China, the European Union and India are the top 3 consumers of edible vegetable oils. The per capita consumption of edible vegetable oils keeps growing in China with the development of China's economy and the improvement of people's living standard. It increased from 7.7 kg in 1996 to 25 kg in 2016, exceeding the global per capita consumption.

According to CRI, the edible vegetable oils consumed in China are mainly soybean oil, palm oil, rapeseed oil and peanut oil which account for approximately 90% of the total consumption. Rapeseed oil and soybean oil are most popular among Chinese residents while minor oils such as olive oil, corn oil and sunflower seed oil are becoming more acceptable with the improvement in health consciousness and consumption trend. Households and the catering industry are the major consumers of rapeseed oil and soybean oil while the food industry prefers lower-priced palm oil to save costs.

Transnational enterprises such as Yihai Kerry have a competitive edge on China's edible vegetable oil market. There are also large-scale domestic edible oil processing enterprises such as Shandong Luhua Group Co., Ltd. and COFCO Corporation.

According to CRI, the cost of oil crops planting is high in China but the yield value is low. China is heavily import-dependent in the raw materials for edible vegetable oil processing. In addition, the domestic edible vegetable oil technology is limited to primary crushing, which leads to low added value of products and low overall profitability of the industry. As Chinese consumers require more in the health benefits

and nutritional value of edible oils, high-end oils such as olive oil and sunflower seed oil are gaining market share, which brings about increasingly fierce competition to the industry. Top quality enterprises are accelerating brand building and sales network distribution, which makes it more difficult for new enterprises to enter the industry. There is an excess supply of edible vegetable oils in China with the expanding production capacity of domestic oil processing enterprises. It is expected that there will be no sharp price increase in the future.

Overall, the bulk vegetable oil industry is less profitable and even loss-making due to the serious overcapacity and intense market competition while minor oils such as olive oil and corn oil have a huge growth potential. The structure of vegetable oil consumption is being adjusted with an increasing demand for customized, high-quality and wholesome vegetable oils.

Topics Covered:

Development environment of China's edible vegetable oil industry

Analysis on supply of and demand for edible vegetable oils in China

Analysis on the competition in China's edible vegetable oil industry

Major edible vegetable oil processing enterprises in China

Factors influencing the development of China's edible vegetable oil industry

Forecast on the supply of and demand for edible vegetable oils in China, 2018-2022

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