

Vietnam Animal feed Comprehensive Report Q3/2016

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Abstracts

Animal feed is an important part in developing the livestock industry which is considered to ensure the global food security. Global animal feed production experiences much volatility, however is still increasing. Poultry feed accounts for the biggest production, followed by forage and pig feed. In total 995 million tons of animal feed produced globally in 2015, Asia took up 1/3 of total production. China still occupies the leading position with 179.93 million tons from 8,550 animal feed factories of the country. Animal feed manufacturing industry in the world is expected to grow in production in 2016 and afterwards.

Value of animal feed exports in the world increased from 2010-2015 in which in 2015, America accounted for the biggest value (16%). Demand for imported food always rises both in value and quantity. CP Group - a Thailand's animal feed manufacturer continued to lead regarding production (27,650 thousand tons in 2015), followed by Cargill (America) with 19,500 tons.

In Vietnam, the shortage of material for production has been existed for long and the country needs to import a large amount of animal feeds. Meanwhile, animal feed accounts for 60% of the cost and price. Up to now, the number of animal feed manufacturing factories in the country is limited with the restricted the producing capability and Vietnam is still manipulated by foreign companies due to the incapability of possessing technology. FDI companies only own fewer factories but take up 60-65% of the total production output and privately state sector only holds 35-40%.

In 2015, animal feed production slightly increased to 15.8 million tons compared to 2014. Regarding structure by animals, forage occupied up to 59% of production, followed by aqua-feed, pet food is negligible in percentage (less than 1%).

According to the Ministry of Industry and Trade, as compared to regional countries, the

price of animal feed in Vietnam is always 15% -20% higher, making products less competitive. Mains causes are that domestic animal feed industry mostly relies on import, hence leads to the high risk of price and exchange rates fluctuation, coupled with the high discount commissions of FDI companies which also pushes the price,...

Currently, there are 2 main distribution methods: Through Level 1, 2 agents, which connecting companies with farms (accounts for 90% of total animal feed produced) and through livestock outsourcing for companies (10% of consumption and only applies in large 3F model companies such as Dabaco, CP, Hung Vuong...). In addition, some companies sell goods directly to farms without agents such as Anco, Hung Vuong, Proconco... to minimize cost and increase competitiveness, especially against FDI companies.

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