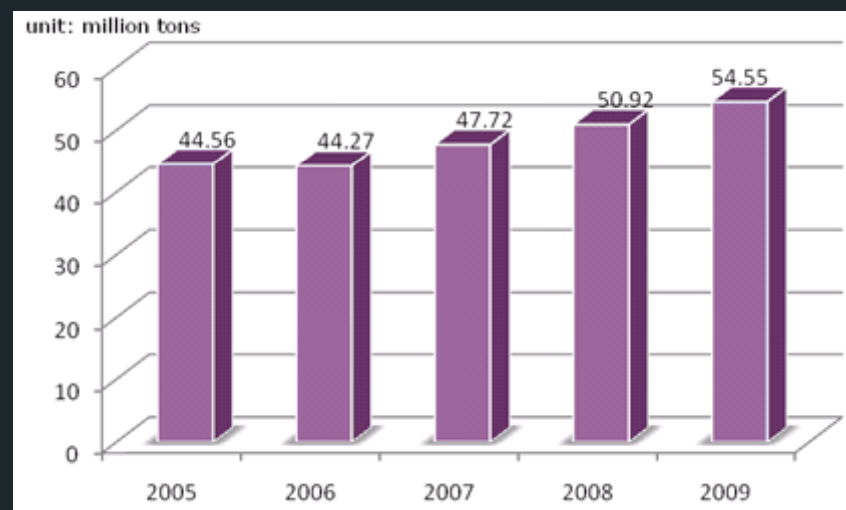


China Soybean and Soybean Processing Industry Report, 2009



Since mid-1990s, the demand for vegetable oil, plant and animal protein has been increasing rapidly in China, so does the demand for soybean. China now is the world's largest consumer of soybean, and its soybean consumption reached 51.41 million tons in 2009, a bit up 0.96% yr-on-yr.

Soybean Consumption in China, 2005-2009



Source: ResearchInChina

In recent years, China's soybean industry has been impacted by cheap imported soybeans. China has imported about one-third of global total soybean import. China imported 42.55 million tons of soybeans in 2009, with a net increase of 5 million tons compared with that of 2008.

Because the benefits which soybeans can generate decline, farmers are reluctant to plant soybeans, soybean acreage and output decrease. In 2009, soybean acreage in China hit 8.8 million hectares, down 3.6% yr-on-yr; and 14.5 million tons of soybeans were produced, down 6.7% yr-on-yr.

"High protein" and "non-transgene" are the two merits of China's soybeans. The isolated soy protein output of China reached 495,000 tons in 2009, a 22.5% YoY rise, and the figure is expected to increase steadily from 2010 to 2012.

This report focuses on the overall development of China soybean and soybean processing industry, including the status quo, import and export, soybean deep-processed products, as well as the development of upstream and downstream enterprises.

China Agri-Industries Holdings Limited and Dongling Grain & Oil Co., Ltd. are soybean oil and soybean meal processing enterprises in China. Their raw materials are mainly imported soybeans.

In Chinese edible oil market, Singapore YHK Group holds 42% shares, COFCO 13%, Jiusan Oil & Fat Co., Ltd. 9%. Facing the brutal competition, China Agri-Industries Holdings Limited hopes to expand production capacity and market shares actively with the advantage of "the whole industrial chain". According to its schedule, China Agri-Industries Holdings Limited will enhance the oilseed processing capacity by 50% or more by the end of 2011.

In 2009, Dongling Grain & Oil Co., Ltd. processed 1.5 million tons of soybeans; during 2005 to 2009, the CAGR averaged 25.5%, far higher than the average growth rate in the industry; the growth rate of soybean oil, soybean meal and soybean phospholipids was the same as that of soybean crush.

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