China Meat Product Industry Report, 2010-2011

Aug. 2011

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This report

- **Analyzes the operation, supply and demand of China meat industry.**
- **Focuses on the Characteristics of China Meat Products Industry Development by Region.**
- **Highlights the operation of key breeding enterprises and processing enterprises in China.**

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Abstract

Driven by robust demand brought by the rising average per capital income level, China's output of meat products witnessed sustained growth during 2007-2010. Taking pork for example, the pork output of China in 2010 increased by 3.7% year-on-year to 50.70 million tons, making up 64% of the total.

With the increasing output of meat products, more and more local Chinese enterprises have been engaged in breeding and processing of meat products, with the number registering 1,817 in 2010. And the integration of meat product industry is expected to boost with the enhanced implementation of food safety as well as increased proportion of slaughtering industrialization.

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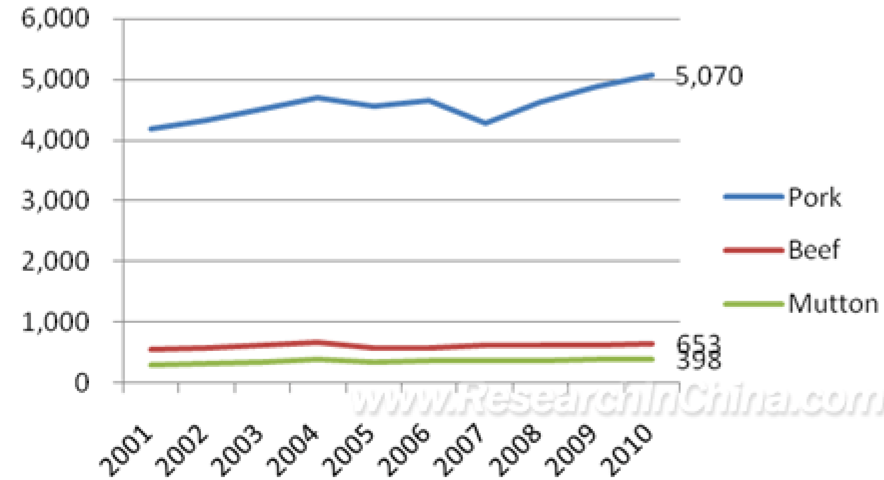
Output of Pork, Beef and Mutton of China, 2001-2010 (10 kt)



Source: National Bureau of Statistic of China; ResearchInChina

Concerning the development of breeding and processing enterprises, both tend to tap into the field of the other side so as to cultivate an integrated industry chain, hedging against the risk arising from volatile upstream raw material price or downstream market. Breeding enterprises such as CHUYING AGRO-PASTORAL, LUONIUSHAN and Dakang Pasture Farming are building meat processing factories to try their luck.

As well, meat product processing enterprises are sparing no effort to expand business while perfecting the industry chain. For instance, Shuanghui Group steps up to develop franchised outlets in the tier-second and third cities; Yurun Food carries the advertising strategy to improve its popularity; Delisi Food strives to expand capacity through IPO fundraising; Maverick Food is poised to join in the first-tier meat product enterprises with the help of capital strength of COFCO; Gaojin Food is beginning to conduct the acquisitions in major hog production provinces while having its foothold in Sichuan.

In terms of product development, the cold fresh meat will become the major consuming meat products, with the consumption proportion in developed countries accounting for 95% while the figure in China no more than 35%. Due to well-preserved nutrient constituent and easy for storage, low-temperature meat product is expected to predominate the cooked meat product market.

Meat product processing enterprises are adjusting their product mix according to the market demand. A case in point is Shuanghui Group, which is expanding the low-temperature meat product business while maintaining growth in its high-temperature meat product business. In 2010, the revenue of Shuanghui Group from low-temperature meat product business shared 25%, up 3 percentage points over 2008.

Yurun Food has long been confident in the prospect of low-temperature meat product development, with the gross margin in 2010 realizing 29.9%, up 0.9 percentage point over 2009. In addition, the second-tier meat product enterprises including Delisi Food and Maverick Food are obsessed with low-temperature meat product business with high gross margin.

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