



**China Meat Products Industry
Report, 2012-2014**

Sept. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

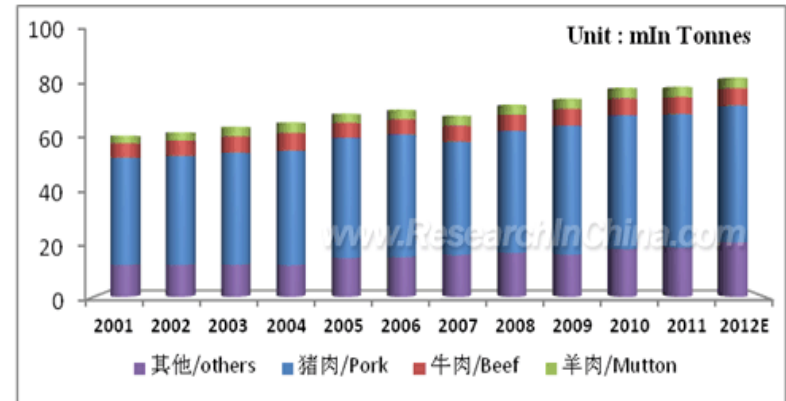
Abstract

Meat products refer to the processed edible meat goods with meat or by products as raw materials, of which, raw meat products mainly consist of hot meat, frozen meat and cold fresh meat; cooked meat products cover low-temperature meat, medium-temperature meat, high-temperature meat products, etc.

Revenue and operating income of China meat product processing industry in the period 2005-2011 showed consistent growth, with CAGR of 21.1% and 25.9%, respectively. In 2011, China meat product and by-product processing industry realized revenue of RMB352.5 billion, a YoY increase of 22.1%, and operating income of RMB18.9 billion, up 25.4% YoY.

In 2011, China's meat production reached 79.57 million tons, including 50.53 million tons of pork, yet the overall production was slightly less than the consumption; meanwhile, the net imports of meat climbed 33.59% YoY to 1.569 million tons. According to the "12th Five-Year Plan" of the meat industry, it is expected that by the end of 2015, China's total meat output will have attained to 85 million tons, involving about 63% from the pork.

China's Meat Production by Livestock, 2001-2012



Source: National Bureau of Statistics, ResearchInChina<China Meat Products Industry Report, 2012-2014>

On the basis of stabilizing livestock breeding, China's key meat breeding enterprises such as Chuying Agro-Pastoral Group Co., Ltd., Jiangxi Zhengbang Technology Co., Ltd., TRS Group, Beijing Shunxin Agriculture Co., Ltd. and Hunan Dakang Pasture Farming Co., Ltd. are gradually marching into the downstream meat product processing market. In April 2012, the fresh pork "ChuMuXiang" of Chuying Agro-Pastoral Group marked the company's formal launch into the downstream pork market. In September 2011, the 400,000 Pig Slaughtering & Processing Project of Hunan Dakang Pasture Farming Co., Ltd. went into trial production without a hitch, with annual production capacity of 400,000-pig slaughtering, which laid down a good foundation for the long-term development.

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At the same time, Henan Shuanghui Investment & Development Co., Ltd., China Yurun Food Group Limited, People's Food Holdings Limited (Jinluo), Henan Zhongpin Food Share Co., Ltd. and other meat product deep processing enterprises are also speeding up the layout of the upstream industry chain. In the period 2011-2015, Shuanghui Investment & Development plans to vigorously expand the breeding business and improve the upstream pork industry chain, and the number of self-produced pigs will have hit 1.832 million heads as of the end of 2015. Yurun Food is currently transferring the focus of development from the butchery trade to the breeding industry, and by 2020 its pig breeding plan will be 100% autotrophic or controllable. Fortune Ng Fung Food (Hebei) Co., Ltd intends to adjust product structure step by step, develop meat products and fast/convenience food at full blast, and march towards city services.

In terms of the product, major enterprises, based on the existing product superiorities, are cracking high-end meat product market via strengthening R&D efforts. In 2011, a high-end product named Bama fermented ham emphatically introduced by Jinzi Ham Co., Ltd. successfully achieved sales volume of 16.04 tons and sales of RMB5.1387 million. In December 2011, Shandong Delisi Food Co., Ltd. officially launched its high-end meat product called “Paluosi” to the market, which, matured through 12-60 months of natural fermentation, was identified as a “three-low” (low fat, calories, cholesterol) healthy food.

China Meat Products Industry Report, 2012-2014 by ResearchInChina chiefly covers the followings.

- ✓ Current situation, market size, revenue (profit), development tendency, etc. of China meat products industry;
- ✓ Regional distribution, supply & demand (production & sales), imports & exports, etc. of meat products in China;
- ✓ Operation, meat products business, development forecasts, etc. of seven key breeding enterprises and nine deep-processing producers in China.

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