



China Feedstuff Industry Report, 2012-2015

July 2013

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.

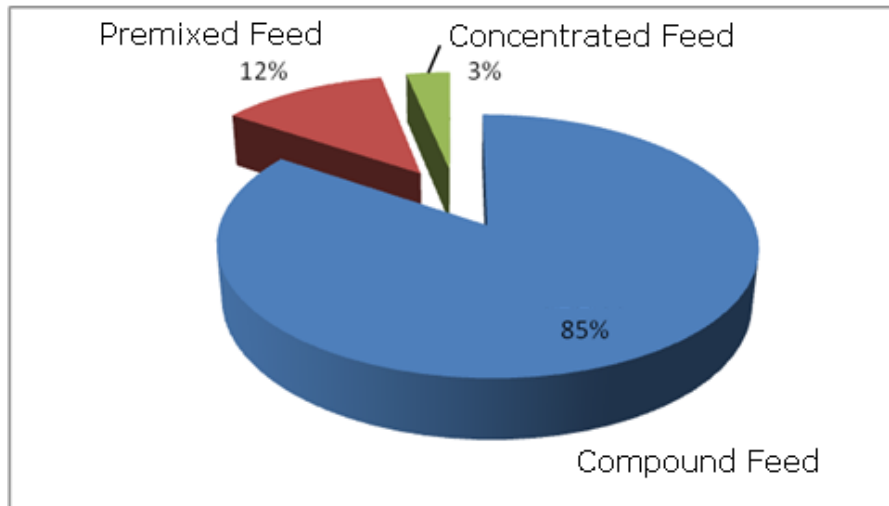
INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

In 2011, China became the world's largest feedstuff producer with an output of 179 million tons. The feedstuff output increased by 6.4% year on year to 191 million tons in 2012, including 161.70 million tons of compound feed (representing a year-on-year increase of 8.4%), 23.50 million tons of concentrated feed (down 7.6% year on year) and 6.2 million tons of premixed feed (up 2.5% year on year).

Output Structure of Chinese Feedstuff (by Type), 2012



Source: Ministry of Agriculture of China;
 ResearchInChina China Feedstuff Industry Report, 2012-2015

By the competition pattern, China feedstuff industry is perfectly competitive, with a low profit margin. In 2012, the overall gross margin of Chinese feedstuff processing enterprises was 11% and the overall net profit margin reached 5.2%, representing absolute and relative lower levels compared with other sub-sectors of agriculture, forestry, animal husbandry and fishery.

After the long-term market competition, the fittest survive, and China feedstuff industry has formed the market competition pattern where the national market is dominated by a minority of national conglomerates, regional markets are led by some medium-sized enterprises and a large number of small companies play supporting roles. In 2012, the total sales volume of livestock, aquaculture and ruminant feedstuff of top 10 Chinese feed companies hit more than 54.90 million tons, accounting for 28.7% of China's total in 2012.

New Hope Liuhe is engaged in feedstuff, breeding, meat products and financial investment. The company operates its business throughout the country and has set up or been building more than 20 branches and subsidiaries in Vietnam, the Philippines, Bangladesh, Indonesia, Cambodia, Sri Lanka, Singapore, Egypt and other countries.

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Tangrenshen acts as one of leading national agricultural industrialization enterprises. Adhering to "breeder pigs, feed and meat products" as three main businesses, the company is committed to the integration of the pig industrial chain. It has over 40 subsidiary companies across China, of which 36 are feedstuff companies, with total feedstuff capacity of nearly 6 million tons.

Tongwei Co., Ltd. focuses on the feedstuff business, and is also involved in aquaculture, meat processing, animal health care as well as new energy, with more than 80 branches and subsidiaries engaged in feedstuff production and marketing throughout China and Southeast Asia. With an annual feedstuff capacity of 7 million tons, it has become the world's largest aquatic feedstuff producer and a major livestock and poultry feed enterprise in China.

China Feedstuff Industry Report 2012-2015 covers the following aspects:

- ⇒ Operation, policies, market supply and demand as well as competition patterns of China feedstuff industry by product;
- ⇒ Analysis on upstream raw materials and downstream breeding industry of China feedstuff industry, including output, sales volume, supply and demand of soybean meal, corn, wheat and additives;
- ⇒ Development trends of China feedstuff industry in terms of aquaculture feedstuff, industrial penetration and feedstuff industrial chain;
- ⇒ Operation, profitability and feedstuff business and outlook of 10 major feedstuff companies such as New Hope, Zhengbang Technology, Tangrenshen and DBN.

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