



China Feed Industrial Development & Analysis 2016

**China Feed Industrial Association –
Information Center**

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China Feed Industry Review



Feed Industry Review

Year 2015 :

- > Pig industry slowing down**
- > Overall economy steady**
- > Feed Industry is getting recovering**
- > Total feed production slightly increased.**

Feed Industry Review 2015



- Total feed production: 1st place in the world
- Total feed production: **200.90 mil tons + 1.4%**
- Compound feed : **+ 2.7; 173 mil tons**
(86.9% share + 1.1%)
- Concentrate feed : **- 8.9%; 19.6 mil tons**
(9.8% share – 1.1%)
- Premix: **+ 1.9% 6.52 mill tons**
(3.3% share + 0.1%)

Feed Industry Review 2015



全国饲料生产增速放缓,与世界饲料发展趋势相一致
**National feed production growth slowed,
consistent with the world feed development
trend :**

- > 1992 - 2012: + 8.5 % avg.**
- > 2013: 193.40 mil tons – 0.6%**
- > 2014: 197.27 mil tons + 2.0%**
- > 2015: 200.09 mil tons + 1.4%**

Feed Industry Review



3. Forecast next 10 year:
1.5% + averagely
(far below previous 10 year 8.5% growth)
4. Overall feed consumption reduced:
 - better conversion rate
 - structure changes
 - PSY technology improved

育肥猪饲料转化率由2014年2.8:1提高到2020年的2.7比1，全国可节约600万吨饲料

hog feed conversion rate by 2.8:1 in 2014 increased to 2.7 :1 in 2020), the national savings of 6 million tons of feed

Review 1985-2015 Feed Production



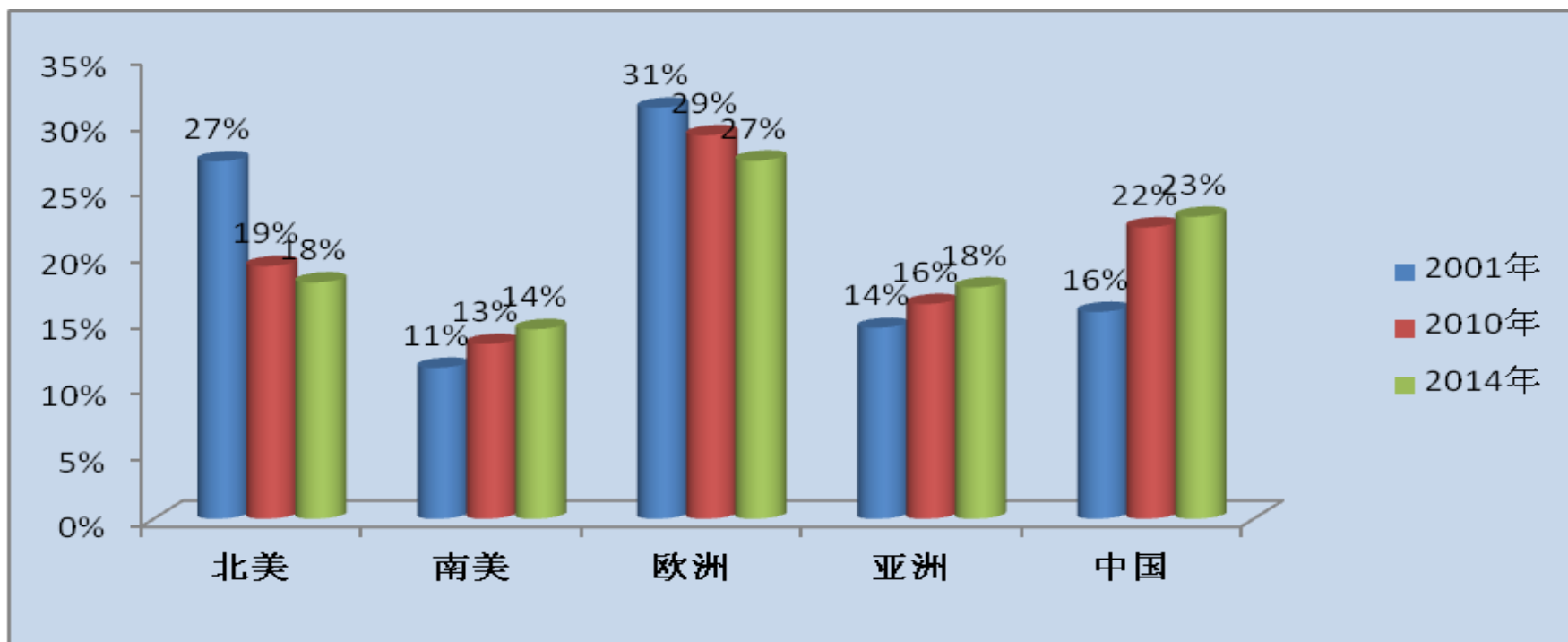
1985年—2015年全国饲料总产量及饲料总产值（万吨、亿元）



Feed Industry Review 2001-2014



N. America and Europe were relatively stable while the proportion of the global output fell. growth in Asia and South America, especially in China, the fastest growing.



Feed Industry Review 2015



> Total output value of national feed industry:
781 billion yuan, + 2.7%. Including:

- commercial feed industry output value
712.58 billion yuan + 2.7%;
- feed additive output value
61.59 billion yuan + 3.6%;
- feed machinery / equipment output value
6.83 billion yuan, +1.4%.

Feed Industry Review 2015



饲料产量 Total Feed Production

單位:万吨
Unit: 10,000mt

种类 Species	数量 Volume	同比 Annual Comparison
猪 Pigs	8,343.6万吨	- 3.2%
蛋禽poultry (egg)	3,019.8万吨	+ 4.1%
肉禽poultry (meat) feed	5,514.8万吨	+ 9.6%
水产aquatic feed:	1,893.1万吨	- 0.5%
反刍动物 ruminants	884.2万吨	+ 0.9%
其他饲料other feed	353.7万吨	- 10.9%

Feed Industry Review 2015



配合饲料Compound Feed

單位:万吨
Unit: 10,000mt

种类 Species	数量 Volume	同比 Annual Comparison
猪 pigs	6,802.1 万吨	- 2.1%
蛋禽poultry (egg)	2,504.7 万吨	+ 6.2%
肉禽poultry (meat) feed	5,274.5万吨	+ 10.5%
水产aquatic feed	1,865.5万吨	- 0.3%
精料补充料 concentrate supplement	655.6万吨	+ 2.3%
其他配合饲料 other feed	293.7万吨	+ 14.8%

Feed Industry Review 2015



浓缩饲料 Concentrated Feed

單位:万吨
Unit: 10,000mt

种类 Species	数量 Volume	同比 Annual Comparison
猪 pigs	1,173.5万吨	- 10.0%
蛋禽 poultry (egg)	3,643万吨	-8.5%
肉禽 poultry (meat) feed	1,874万吨	- 10.0%
水产 aquatic feed	300万吨	- 27.8%
反刍动物 ruminants	195万吨	- 6.3%
其他饲料 other feed	37.4万吨	+ 27.0%

Feed Industry Review 2015



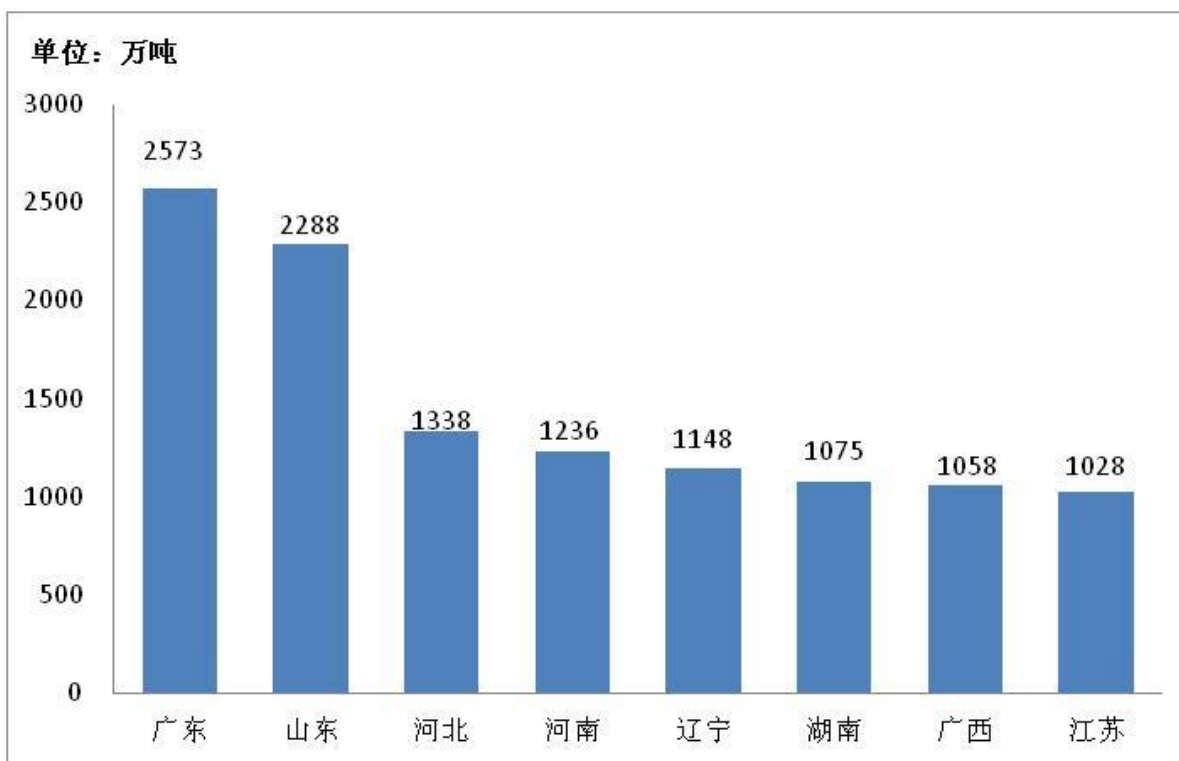
添加剂预混合饲料 Pre-mixed Feed

單位:万吨
Unit: 10,000mt

种类 Species	数量 Volume	同比 Annual Comparison
猪 pigs	368 万吨	+ 0.1%
蛋禽 poultry (egg)	150.8 万吨	+ 4.5%
肉禽 poultry (meat) feed	52.8 万吨	+ 7.0%
水产 aquatic fee:	24.6 万吨	- 13.7%
反刍动物 ruminants	33.6 万吨	+ 21.3%
其他饲料 other feed	22.7 万吨	- 1.9%

Feed Industry Review

top 8 provinces 58.7% share+ 2.5%



2015年8个饲料产量大省产量11 745万吨，占全国饲料总产量58.7%，同比增长2.5%。

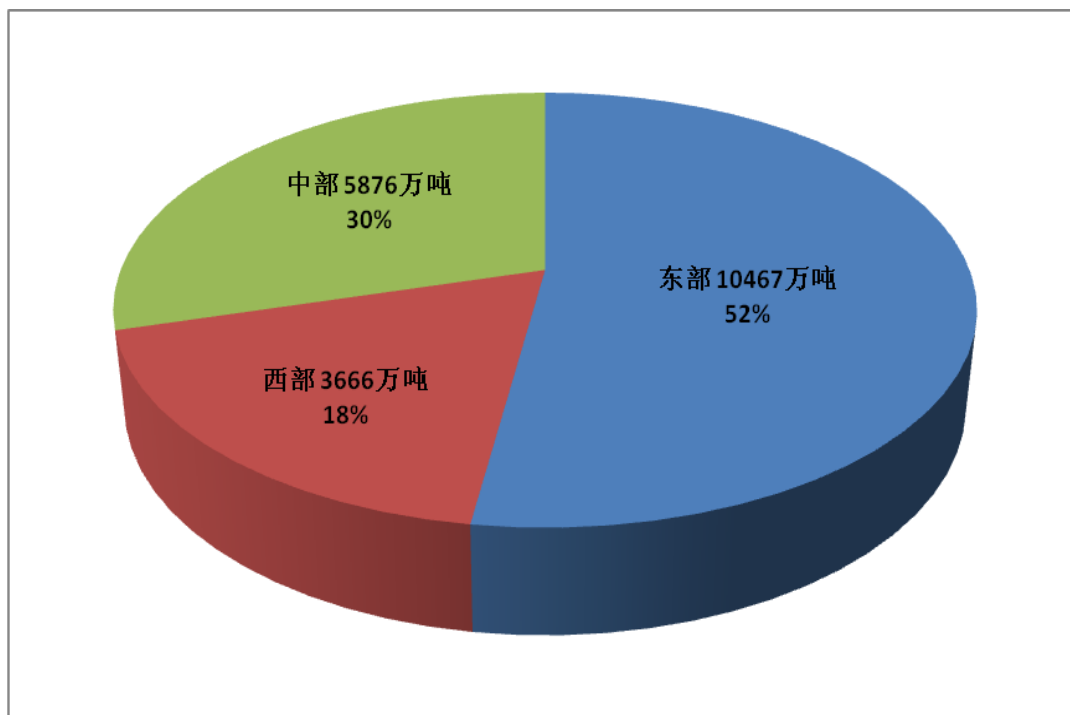
图1 2015年8省份饲料产量

2015 Feed Production top 8 provinces



Feed Industry Review

E 52%, C 30%, W 18% regions proportion



东中西部饲料产量占全国饲料产量比重

东部地区、中部地区、西部地区的总产量分别占全国的**52%**、**30%**和**18%**，与**2014年**相比，东部地区增长**0.5%**，中部地区增长**0.8%**，西部地区下降**1.3%**

Feed Industry Review 2015



- > Number of Feed Makers 2015
 - Feed/Additives total : **13236 including**
 - . Additives: 1691
 - . Additives Pre-mix: 2747
 - . Concentrate/Compound/Supplement: 6764
 - . Single feed: 2034
- > Scale of Feed Enterprises Groups
 - . Over 500,000 tons: 48 (share 56.5%)
 - . Over 1 million tons: 32 (share 51%)



Feed Production Situation

1st Half 2016

Feed Production Situation FH 2016



According to MOA 180 key tracking enterprise statistics:

- > **Total feed output : 9.71 million tons + 4%**
- . Compound feed 8.251 million tons + 4.8%
- . Concentrate feed 1.02 million tons – 1.9%
- . Additive pre-mix 0.439 million tons + 4.8%。

Feed Production Situation FH 2016



2016年上半年饲料产量 Feed Output by Species 2016 FH

單位:万吨
Unit: 10,000mt

种类 Species	数量 Volume	同比 Annual Comparison
猪 Pigs	346.1万吨	-1.5%
蛋禽 poultry (egg)	179.6万吨	+ 4.8%
肉禽 poultry (meat) feed	303.8万吨	+ 15.8%
水产 aquatic feed	67.0万吨	- 8.5%
反刍动物 ruminants	62.6万吨	+ 0.8%
其他饲料 other feed	11.8万吨	- 9.9%



Feed Production Situation FH 2016

1-6月份，监测数据显示，**饲料产量继2013年到2015年连续三年下降后开始恢复性增长..**

feed industry in three consecutive years decreased after showing a recovery of growth. 1-6 months, monitoring data show that feed production in 2013 to 2015 after three consecutive years of decline began to restore growth, and the growth rate of more than 4%,



猪饲料恢复性增长态势十分明显。

虽在总量上与去年同期比依然下降

Pig feed recovery growth is very obvious. Although the total amount compared with the same period last year is still down, but 1-6 months the monthly growth of pig feed.



肉禽饲料产量创近四年最高

Poultry (meat) feed production – the highest in nearly 4 years, has rebound

- growth of 15.8%.
- more than 10% consecutive years of growth,



蛋禽饲料同比稳定增长。

Poultry (egg) feed experienced in 2013, 2014, more than 10% of the decline in 2015 ushered in growth in 2016 on the basis of the previous year and then increased by 4.8%.



——水产饲料降幅收窄，反刍饲料增长乏力。

- > Aquatic feed decline narrowed decreased by 10.8 %
- > Ruminant sluggish growth only 0.8% (2014 growth 10.7%)



Feed Production Tendency

2016



**Pig Feed (end of 2015):
451.13 million live pigs,- 3.2%.**

- . Pigs in the high price range,**
- . Small and medium farmers withdrawal,**
- . Scale of breeding improved**
- . Result: pig feed consumption,
output of pig feed increasing.**

Feed Production Tendency 2016



- . This round of pig cycle will be extended, the pig industry bull market will continue.**
- . Pork prices are expected throughout the year or the first half of 2017, the first half of 2016.**
- . Pig price, although there are repeated, but has been in the high range of fluctuations.**

Feed Production Tendency 2016



生猪存栏**47个月**一直下降，**饲料需求量下降幅度较大**

- . Pig herds from 10/2012 to 8/2016, up 47 consecutive months of decline, feed demand decreased greatly.
- . In March 18, 2015, with the price of pigs improved, with sows and pigs can be eliminated slowly, farmers Bulan piglet and sow intention gradually, hog supply gradually restored,
- . Feed demand has improved, but the slow recovery of pig feed.

Feed Production Tendency 2016



2016年6月底，猪肉价格出现回落迹象，但继续处于较高位置，猪粮比价已经出现明显的回落，养殖户预期收益下滑，养殖意愿将会减弱

- . Pork prices slowing down, but continue to be in a higher position, the import of pork prices have significant advantages,
- . The recent decline in pork prices, rising feed costs, pig grain price has been a significant decline, farmers expected revenue decline, the breeding will be reduced.

Feed Production Tendency 2016



从长期来看，活猪和猪肉价格总体将震荡上行猪价维持高位应该是**2016**年的常态，但是暴涨可能性不大，

. Pigs and pork prices overall upward shocks

. Importing Pork Meat:

2014 : 650,000 tons

2015 : 777,500 tons,

FH 2016: 762,000 tons (Meat)

680,200 tons (pig offal)

*** Estimation 2016 total:**

1.4 million tons (Meat)

1.24 million tons (offal)

Feed Production Tendency 2016



猪肉的消费需求

- . 2016 full year pig price is still a continuation of the bull market, farming profits will remain high**
- . Macroeconomic downturn, the consumer demand for pork will be further inhibited, is expected to increase the total national pork consumption rate of less than 1%. In 2016 Chinese pork production stable and decreased slightly, a decline of about 0.5%**

Feed Production Tendency 2016



生猪供应的整体状况已由偏紧转为宽松。

- . The overall situation of pig supply from tight to loose. In the second half, the pig feed production gradually increased, the annual output in 2015 or a slight increase in the year.**
- . The 2016 swine feed production will show a low high trend, the annual output showed a slight growth, or growth trend in 1%-2%.**

Feed Production Tendency 2016

禽料—蛋鸡 Poultry Feed – Laying Hens (1)



- . The national average in laying hens population 1 billion 27 million,
- . FH 2016 egg production 8.955 million tons.
- . The feed prices low, the cost of feeding does not increase, farming profits can be maintained, will continue to expand,
- . Expected short-term price of eggs is expected to stabilize low adjustment, small fluctuations, the overall profit can be obtained.

Feed Production Tendency 2016



禽料—蛋鸡 Poultry Feed – Laying Hens (2)

- . The breeding cost down, farming profits can be maintained, egg and poultry breeding stock continues to expand.
- . **Forecast, 2016 egg production :**
30.221 million tons, + 0.8% in 2016,
egg and poultry feed output will keep growing.
Therefore, egg feed production is expected to return to 2012 levels remain stable.

Feed Production Tendency 2016



禽料—蛋鸡 Poultry Feed – Laying Hens (3)

. Overall, the South flood of poultry breeding severely damaged, at the same time, affected by the egg laying rate towers, will further decline, the elimination of increasing egg supply tight, egg prices are expected to rise.

. SH 2016, with Holiday Stocking, egg prices rose, egg and poultry stock rise, feed demand gradually increased, total output will increase compared to the same period in 2015.

Feed Production Tendency 2016



禽饲料-白羽肉鸡

Poultry Feed – White Feather Broiler (1)

If in 2016 the United States and France and other countries continue to embargo will significantly affected the introduction of progenitor chicken, thus affecting the 2017/18 commercial broiler supply.

Feed Production Tendency 2016



禽饲料-白羽肉鸡

Poultry Feed – White Feather Broiler (2)

2016年2月， UK Bird Flu;

2016年4月， France/USA Bird Flu Epidemic;

2016年6月， Netherland Bird Flu;

2016年8月， France H5N2 highly pathogenic avian influenza..

This will lead to shortage of meat and poultry production.



禽饲料-白羽肉鸡

Poultry Feed – White Feather Broiler (3)

.843,900 sets of herds are at its lowest level since 2009.

. In 2016 the amount of progenitor chicken introduction cliff fall means that 2017 will be a serious shortage of supply, has long white feather broiler or will exceed expectations.

Feed Production Tendency 2016



禽饲料-白羽肉鸡

Poultry Feed – White Feather Broiler (4)

- . The influence of multiple bird flu raging in USA/Europe, broiler prices boosted.
- . White feather broiler industry in the industrial chain will gradually to achieve the balance of supply and demand of overall profitability.
- . The latter is expected, broiler breeding stock is still tight, stimulate farmers Bulan enthusiasm, forage yield will increase.

Feed Production Tendency 2016



禽饲料-白羽肉鸡

Poultry Feed – White Feather Broiler (5)

- . Large companies are expanding the scale of farming, poultry herds larger at present, feed demand is rising.
- . Poultry business time will be extended, boost farmers increase stock enthusiasm, feed demand will be sustained growth



禽饲料-黄羽肉鸡

Poultry Feed – Yellow Feather Broiler

- . FH 2016 GP breeders have enough capacity, the parent stock scale continues to increase,**
- . Commodity generation Yellow Feather meat and chicken breeding efficiency has declined, Yellow feather broiler profit generally narrowed,**



水产饲料 Aqua Feed (1)

Major Factors:

- . National macroeconomic operation,
- . Weather
- . Stocking area,
- . Sea food product market retailing price
- . cost of breeding aquatic products
- . import and export trade, and so on.
- . Shrimp disease/ Environmental degeneration

Feed Production Tendency 2016



水产饲料 Aqua Feed (2)

- . FH 2016, China's aquaculture aquaculture production stable start, most is to stabilize the situation, and put a steady increase in the area of seed stocking.
- . Grass carp, bighead, silver carp, crucian carp, bream fish pond comprehensive price is early has risen more than 20%, freshwater crayfish "volume and price increases".
- . Southern white prawn prices remained stable,



水产饲料Aqua Feed (3)

- > 2015 freshwater fish has stabilized
- > 2015 Total Aqua products output: 66.99 million tons + 3.69% including:
 - . Aquaculture sea food - 49.370 million tons + 3.99%,
 - . Sea Catching : 16.617 million tons + 2.84%,
 - . Aquaculture (Farming) vs Catching about 3 to 1
 - . Aquatic feed production 18.931 million tons, - 0.5%.

Feed Production Tendency 2016



水产饲料Aqua Feed (4)

- . 2016 FH el nino, storm weather
- . 180 feed enterprises aquatic feed production 670,000 tons, - 8.5%.
- . High cost of fishmeal caused aquatic feed prices surge
- . The traditional aquaculture feed production increased in the month of production decline.

Feed Production Tendency 2016

反刍饲料 Ruminant Feed (1)



- . Government policies is conducive to the promotion of ruminant feed.
- . MOA (May 2015) - "on promoting the development of the guiding opinions on the development of the livestock industry,"
- . MOA (May 2016) "on the promotion of the development of the grass and animal husbandry guidance.
- . Target to 2020, bovine/ovine meat production 13 million tons, output of milk 41 million tons

Feed Production Tendency 2016



2015-2020年牛羊肉消费需求预测

Beef & Mutton Consumption Demand Estimation 2015-2020

Unit : 10,000mt, kg, %

	2000	2005	2010	2015	2020	2010-2015 Growth Rate	2015-2020 Growth Rate
Total Beef Consumption	513	567	653	721	796	2.00%	2.00%
Average Beef consumption	4.04	4.33	4.87	5.19	5.49	1.28%	1.13%
Total Lamb consumption	265	352	403	450	502	2.23%	2.21%
Average Lamb consumption	2.09	2.69	3.01	3.23	3.46	1.42%	1.39%

Feed Production Tendency 2016



反刍饲料 Ruminant Feed (2)

2015,

- . Beef production 7 million tons, up 1.6%;
 - . Lamb production 4.41 million tons, up 2.9%
 - . Milk 37.55 million tons, up 0.8%.
- . China's animal husbandry has shown good momentum of accelerated development,



反刍饲料 Ruminant Feed (3)

- . Importing Beef and Lamb continued to pour into the Chinese market,
- . the number of imported milk products accounted for 1/3 of the total domestic consumption.
- . Affected by the import of beef and mutton and beef and mutton in the northern region, the price of beef and mutton mixed with each other.



反刍饲料 Ruminant Feed (4)

- . In 2016, affected by the macroeconomic slowdown, the decline in the purchasing power of domestic residents; the domestic consumption of beef and lamb has decreased.
- . Domestic price of beef/lamb is 1.8-2 times of pork; 4.3-4.8 times the consumption of whole chicken prices,
- . Consumption in pork & chicken instead of beef & lamb enhancement



结论 Conclusion:

From the feed varieties,

- Sows and pig herds in recovery stage, standardized scale farming has increased steadily, pig feed consumption will be better than 2015;
- Poultry meat feed flat or slightly down;
- Aquatic feed, Ruminant feed, Pet feed increase,
- Fox mink special aquaculture feed continued to decrease.
- Pig and poultry industry boom will still be worth looking forward to.



Thank You

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