



中国有机会成为乳品出口国家吗？

The possibility of China
to be a dairy exporter

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27/11/2024

目录

Contents

01

中国奶业发展基本情况
Situation of China dairy industry

02

中国奶业面临的机遇和挑战
China dairy opportunities & challenges

03

中国乳制品贸易
China dairy trade

04

中国乳品出口的可能性
The possibility of China dairy exports

01

中国奶业发展基本情况
Situation of China
dairy industry

中国原料奶总供给

China raw milk total supply

2023 总供给 6018 万吨

2023 raw milk total supply 60.18 million tons

国产 4300万吨 71% 牛奶 4197万吨 进口 1718万吨 (折原奶) 29%

Domestic 43.0 mill.tons 71% of total cow milk 41.97 mill.tons import equivalent to raw milk 17.18 mill.tons 29% of total

2008 总供给 3545万吨

2008 raw milk total supply 35.45 million tons

国产 3236万吨 91.3% 进口 309万吨 (折原奶) 8.7%

Domestic 32.36 mill.tons 91.3% of total import equivalent raw milk 3.09 mill.tons 8.7% of total

2008-2023 +24.73 mill.tons Average annual growth rate 3.6%

国产 +1064万吨 43% 进口 +1409万吨 (折原奶) 57%

Domestic +10.64 mill.tons 43% import equivalent raw milk +14.09 mill.tons 57%

中国牛奶产量

Milk production in China

2023中国原奶产量4290万吨 占全球奶产量4.4%

全球排名第四

2023 China raw milk production 42.9 mill. tons, 4.4% of global milk production, ranking fourth in the world

中国成母牛单产 9.4吨 美国 10.94吨 以色列 12吨
荷兰 9吨

China average yield of adult cows 9.4 tons, US 10.94 tons, Israel 12 tons, Netherland 9 tons

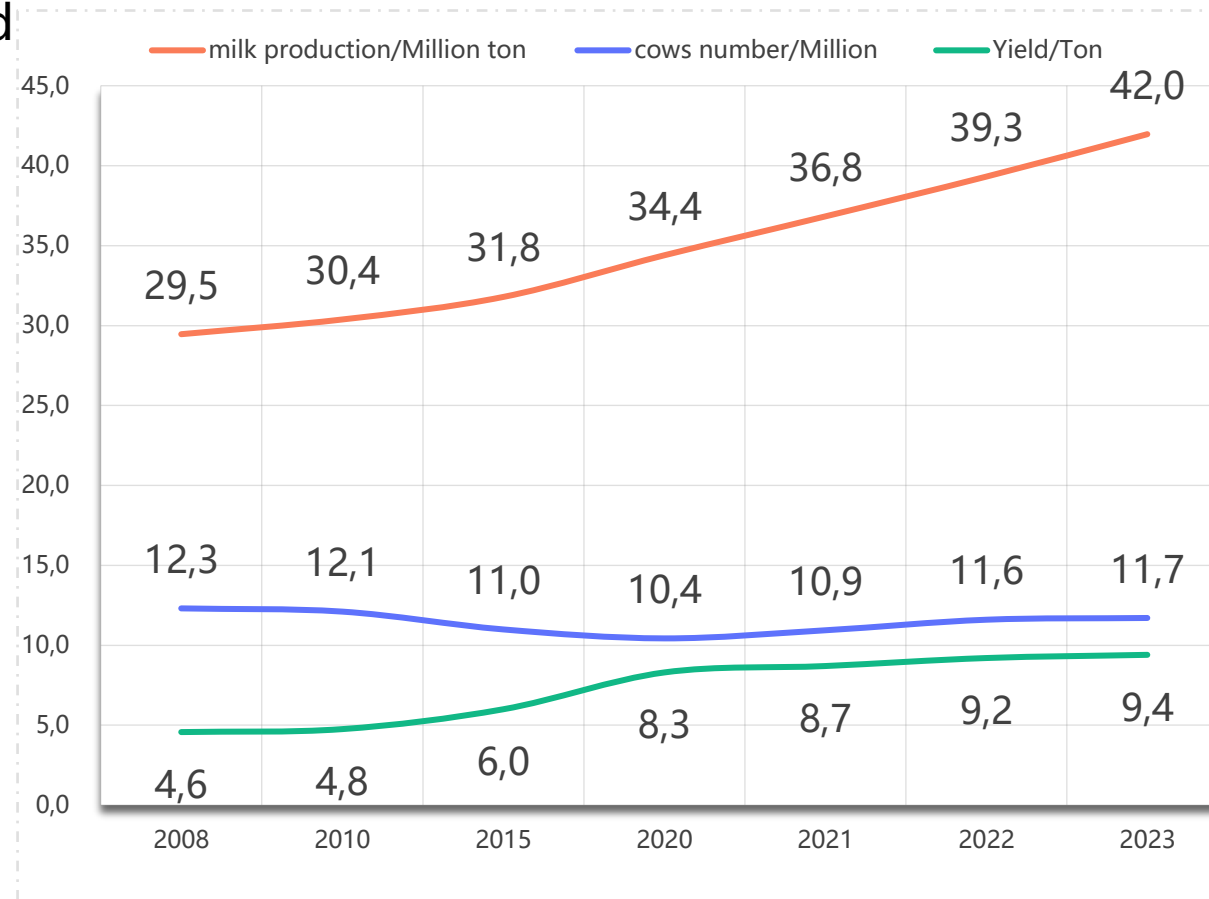
奶牛存栏 1171万头

cow number 11.71million head

近十年中国牛奶产量和单产快速提高

In the past decade, China's milk production and unit yield have increased rapidly

中国牛奶产量、存栏、单产2008-2023
China milk production, cows number, yield 2008-2023



中国原奶分布

China raw milk distribution



中国原奶 75%在三北地区 25%在南方 中国人口74%在南方 26%在北方

China raw milk 75% in the northern areas, 25% in the south, but the population 74% in the south, 26% in the north

2023 北方地区 (华北 东北 西北) 牛奶产量 3170万吨 占全国75.5%

2023 Milk production in northern China is 31.7 million tons, accounting for 75.5% of the total production

中国南方原料奶产量比例保持25%

raw milk production in southern China remains at 25%

北奶南运是中国奶业一大特点 年北奶南运1500万吨 占牛奶产量36%

Raw milk transport from North to south is a major feature of China dairy industry.

The annual milk transport from north to south is 15 million tons, accounting for 36% of raw milk production

中国牧场规模

Farm size in China



中国的土地、资源、社会服务体系决定了大规模牧场更有优势

China's land, resources, and social service system make large-scale farm more advantageous

中国牧场主流是规模牧场 公司所有 团队运营

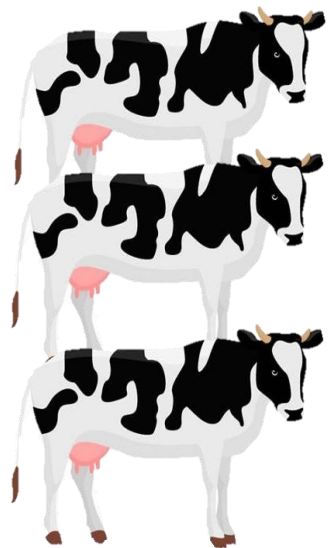
The mainstream of China farm is large-scale farm, company-owned, team operated

	cow number/000'head	farm number/000'	Average size/head
中国/CN	3150	6	525
新西兰/NZ	4675	10.6	441
美国/US	9386	26.3	357
欧盟-27/EU-27	20074	880	23

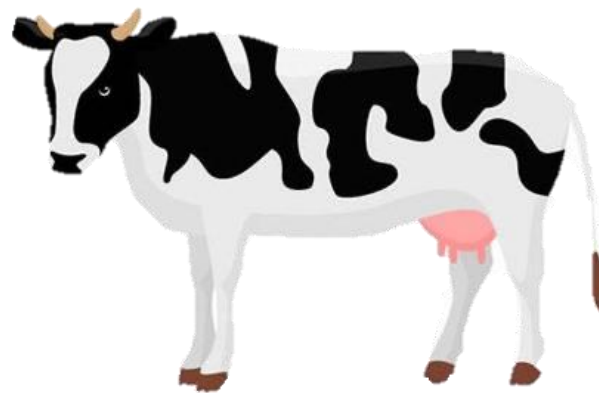
注：成母牛存栏 cow number is for adult cow

中国牧场结构

China farm structure



Top30牧业集团
平均牧场存栏5268头
Top30 Farm Group
The avg. cattle is
5,268 head/farm



Top30牧业集团
奶牛占总存栏46.3%
Top30 Farm Group
Cattle accounted for
46.3% of the total inventory



Top30牧业集团
牛奶产量约占商品奶总量50%
Top30 Fram Group
Milk production accounts for
50% of the total volume of
commercial milk

中国原奶价格

China raw milk prices

中国奶价持续下降 已经低于欧美国家

Milk prices in China continue to fall, below EU and US raw milk price

2021年初中国奶价比欧美国家高出至少1.5元/KG

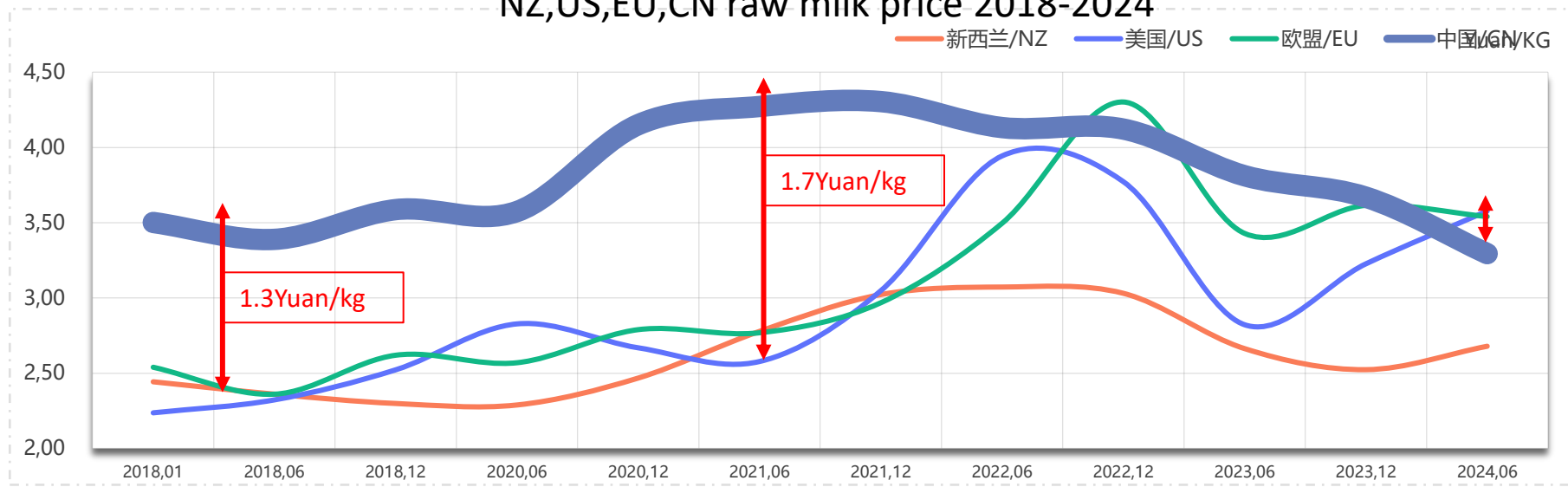
Beginning of 2021, China raw milk prices at least 1.5 yuan /KG higher than EU and US

2024年6月已低于欧美0.2元/KG

June 2024, China raw milk price 0.2 yuan /KG lower than EU and US

新西兰、美国、欧盟、中国原奶价格2018-2024

NZ,US,EU,CN raw milk price 2018-2024



中国乳制品产量 China dairy production

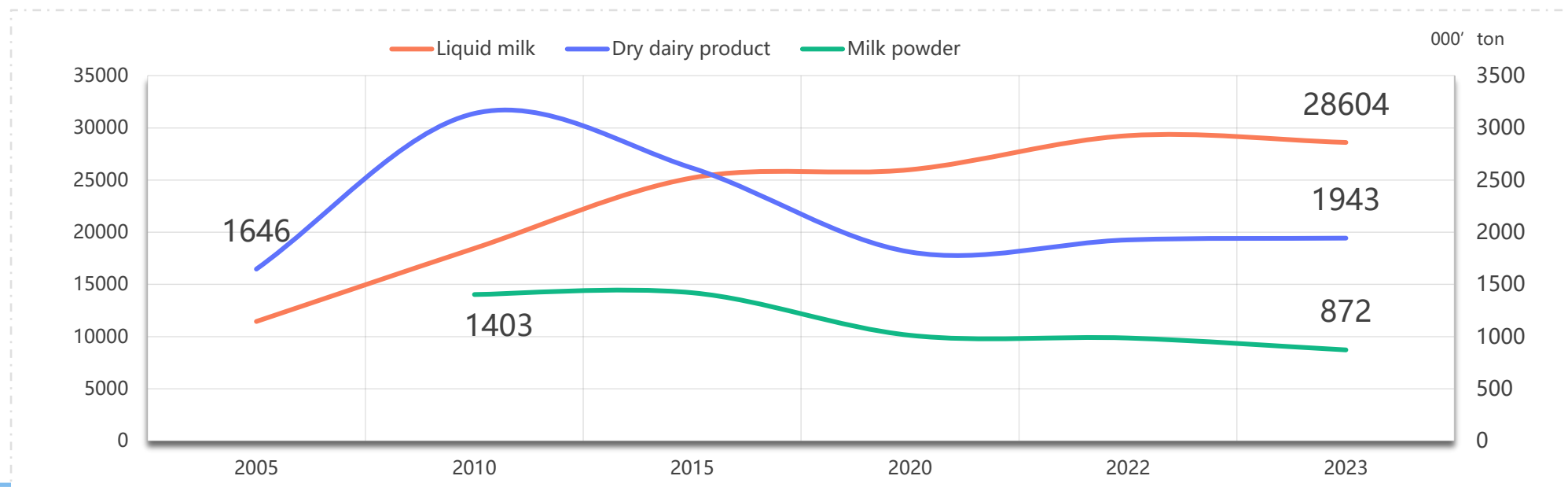
中国乳制品产品结构单一 商品原奶90%用于液态奶产品

China dairy products 'structure is is a single; 90% of raw milk is used for liquid milk products

2023年中国液态奶产量2860万吨 干乳制品194.3万吨 奶粉87.2万吨

2023 China liquid milk 28.6 million tons; dry dairy products 1.94 million tons; milk powder 872 tho tons

中国乳制品产量 China dairy production



02

中国奶业面临的机遇和挑战
China dairy opportunities
& challenges

2021-23中国原奶超速增长 原奶过剩

2021-23 China's raw milk overspeed growth



过去三年牛奶产量超速增长

In the past three years, China 's raw milk had a rapid growth

2021 36.83 million tons + 2.43 million tons +7.1%

2022 39.32 million tons + 2.49 million tons + 6.8%

2023 41.97 million tons + 2.65 million tons +6.7%

疫情背景下 消费大幅增长 错误判断形势 政府、企业新建牧场 进口奶牛

On the back of COVID-19, dairy consumption has surged, misjudge the situation, government and companies build new farms to import cows

疫情结束 牛奶需求下降 全行业过剩 陷入严重困境

After COVID-19, milk demand falling, dairy industry wide surplus

中国牧场亏损面已达80% 80% of China farms lose money

原奶过剩 奶价持续下滑 已经低于成本线

Raw milk surplus, milk prices continue to decline, below the cost line

农业农村部监测全国生鲜乳价格 11月3.12元/公斤

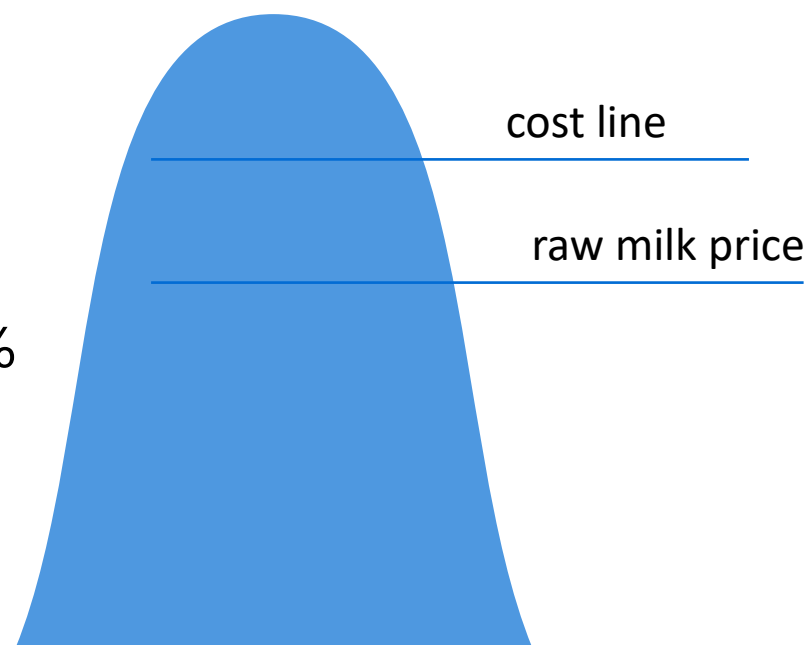
Raw milk price Nov 2024 3.12yuan/KG

2021年最高价4.38元/公斤 降幅近30%

2021 the highest price 4.38yuan/KG decrease 30%

全国牧场亏损面达到80%

80% of China farms lose money



中国原奶收购垄断

China's raw milk buying monopoly

伊利、蒙牛收奶量占比超过55%

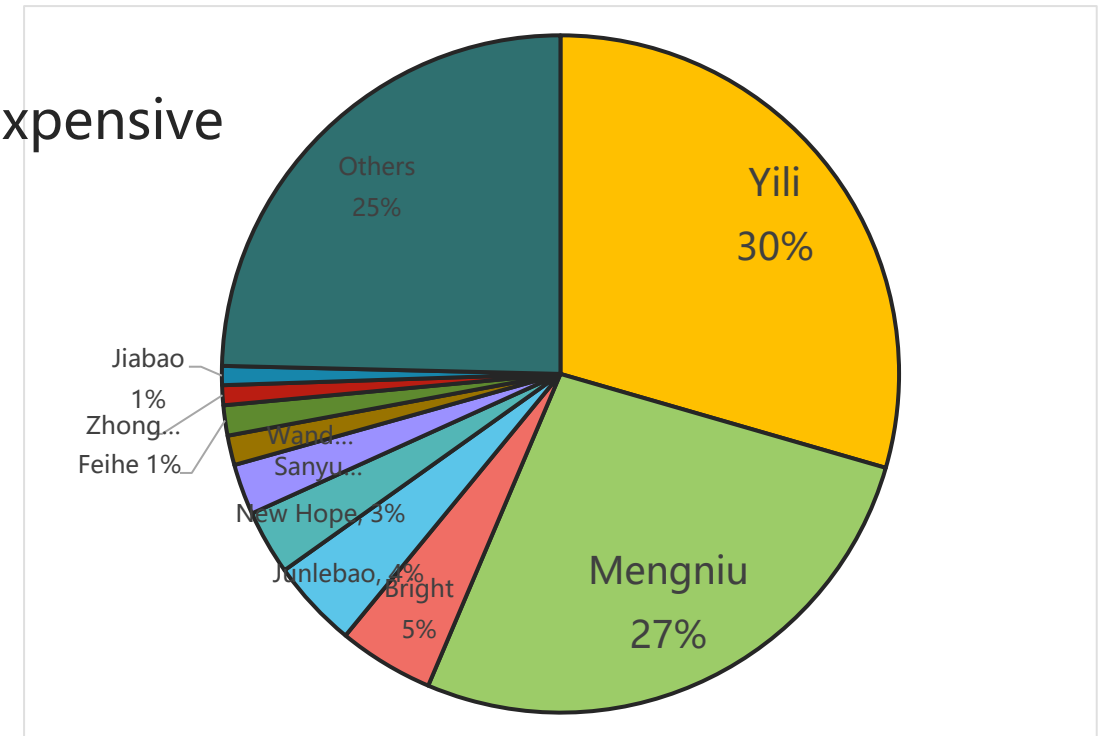
more than 55% of the raw milk delivered to Yili and Mengniu

Top10乳企收奶量占比75.4%

75% of the raw milk delivered to Top10 dairy companies

乳企自有牧场奶价更高

Milk from dairy companies' own farms is more expensive



原奶持续过剩 消费低迷是主因

The persistent oversupply of raw milk

Sluggish consumption is main cause



过去三年总供给减少超300万吨 目前中国原奶持续过剩 主因是全国性乳品消费下滑

In the past three years, total raw milk supply has decreased by more than 3 million tons.

The current surplus of raw milk in China is mainly due to the decline in national dairy consumption

2022-2024前三季度 牛奶产量增长512万吨

2022-2024Q3 Milk production increased 5.12 million tons

进口乳品折合原奶减少660万吨

import dairy products equivalent to raw milk decrease 6.6 million tons

进口活牛减量 导致牛奶产量减少190万吨

Reduced imports of live cattle resulted in a decrease in raw milk production of 1.9 million

tonnes

奶源过剩 奶价下降 干乳制品出现市场机会

Raw milk oversupply, milk prices decline, dry dairy products market opportunities



原奶成本下降 Raw milk cost get lower

饲料价格下降 2024上半年豆粕、玉米价格分别下降16.6%、12.7% 公斤奶成本下降

In the first half of 2024, soybean meal and corn prices fell by 16.6% and 12.7% respectively, the cost of milk fell down

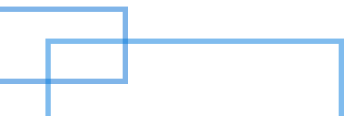
黄油、奶酪等干乳制品加工厂增加 Butter, cheese etc. dry dairy processing plants increased

过剩奶源喷粉 干乳制品尤其大包粉产量增加

Excess raw milk process milk powder, dry products, milk powder production increase

区域乳企新建奶酪、黄油加工厂

Regional dairy companies bulid new cheese, butter processing plants



03

中国乳制品贸易
China dairy trade

中国进口乳品全球乳品总贸易量20%

China imports 20% of the world's total dairy trade

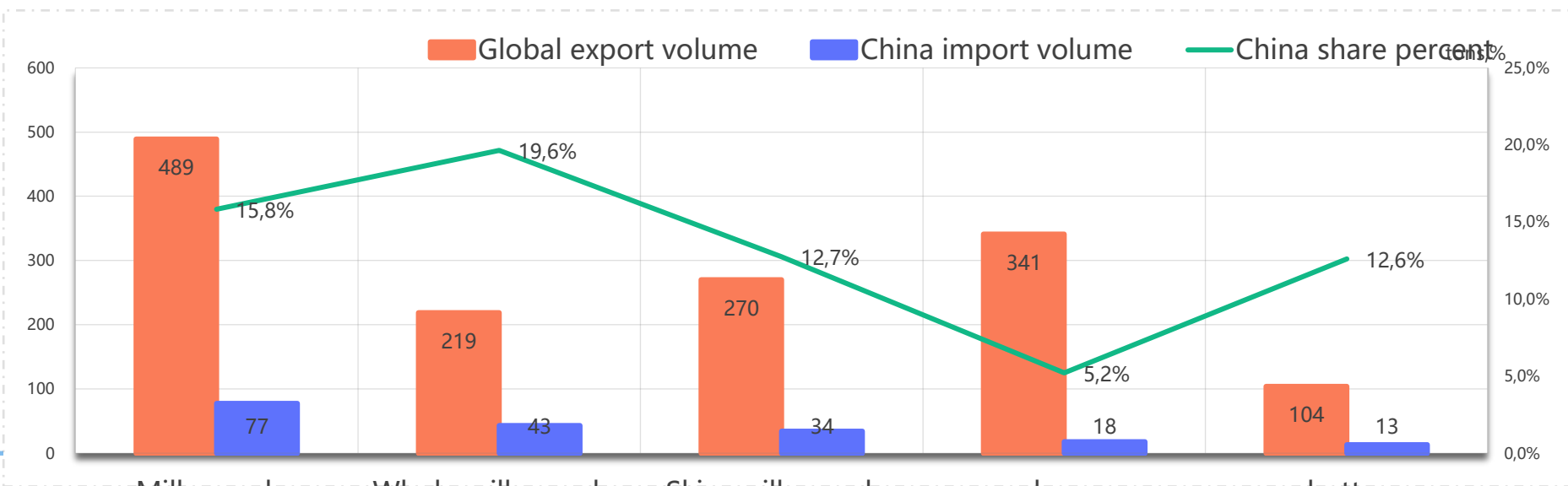
2023中国进口奶粉77万吨 占国际奶粉贸易15.8%

2023China import milk powder 770 tho. tons 15.8%of international milk powder trade

全脂奶粉 43万吨 占19.6% Whole milk powder 430 tho. tons accounted for 19.6%

奶酪18万吨 占5.2% cheese 180 tho. tons accounted for 5.2%

乳清粉66万吨 占40% whey powder 660 tho. tons accounted for 40%

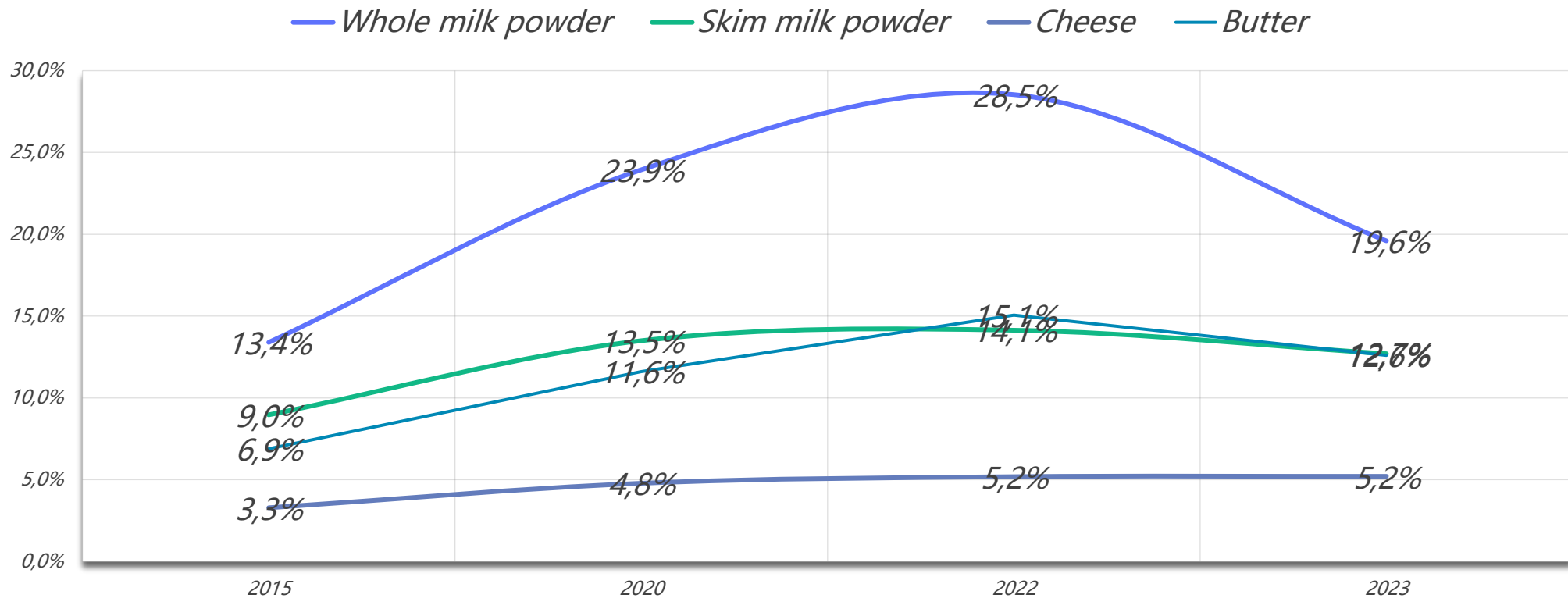


2023中国进口乳品占全球乳品贸易份额下降

The share of China imported dairy products in global dairy trade decrease 2023

中国乳品进口占国际乳品贸易比例

China import dairy products account for the proportion of international dairy trade



中国进口乳品结构

Structure of China imported dairy products



2023进口折合原奶1718万吨 同比-8.4% 占国内总供给29%

2023 China Imported dairy products equivalent to raw milk 17.18 million tons decrease 8.4% to last year 29% of the total domestic supply

000'ton	import volume	YOY%
Drydairyproduct	2040	-10.20%
MilkPowder	774	-25.20%
Infantformula	223	-16.00%
whey	663	9.40%
creams	131	-8.70%
cheese	178	22.50%
Condensedmilk	17	-29.70%
protein	54	4.80%
Liquidmilk	835	-16.60%
Packagedmilk	549	-23.90%
Whippedcream	265	3.60%
yogurt	21	-9.80%

New Zealand is China's largest source of dairy imports

新西兰95%乳品出口到全球市场 中国是新西兰乳品出口最大市场

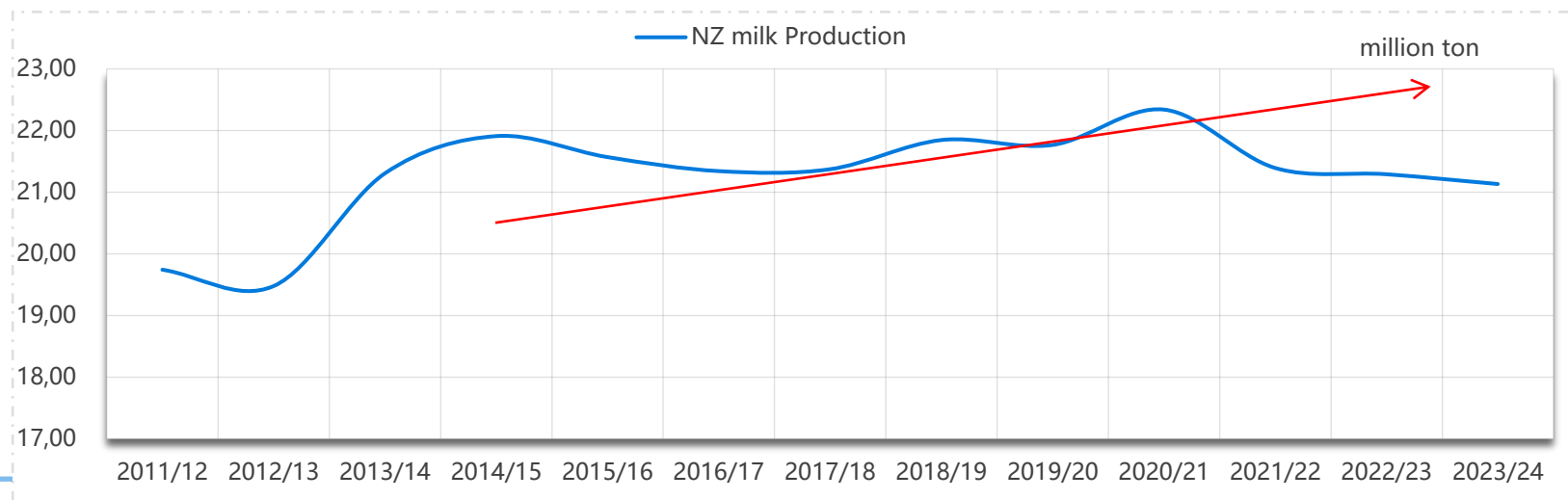
95% of New Zealand's dairy products are exported to the global market. China is the largest market for New Zealand's dairy products

中国进口量最大的奶粉70%来自新西兰

China's largest import dairy products: milk powder. 70% from New Zealand

中新自贸协定 新西兰乳品出口到中国关税为零

China and New Zealand Free Trade Agreement Some New Zealand dairy exports to China are tariff-free



中国乳制品出口 China dairy products export

中国乳制品出口量少 以中国香港为主

China export very few dairy products, mainly exported to Hong Kong, China

2023中国出口乳制品 58935吨

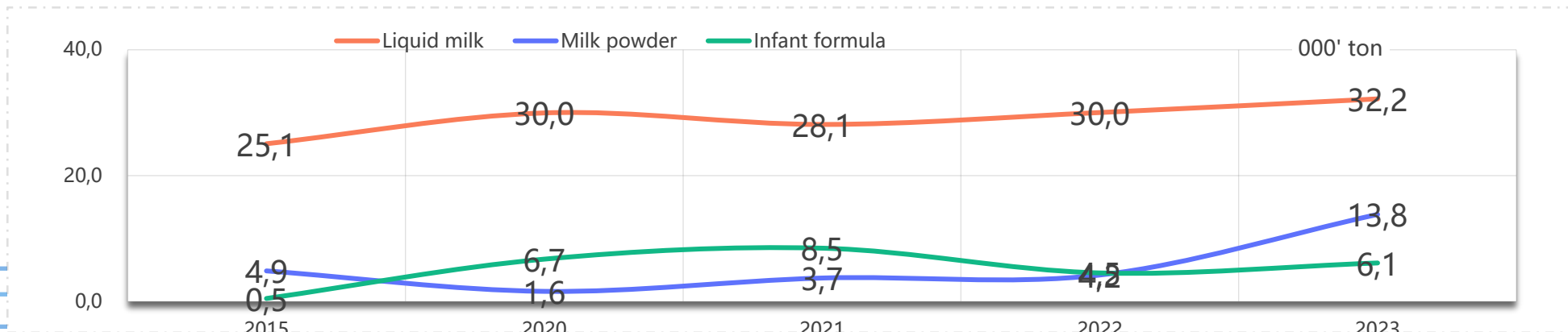
2023 China export dairy products 58935ton

Liquid milk 32208 ton 90% export to Hong Kong, China

Milk powder 13830 ton export to Venezuela, Nigeria, Hong Kong, Singapore

Infant formula 6120ton 80% export to Hong Kong, China

中国乳制品出口量 China dairy export volume



04

中国乳制品出口的可能性

**The possibility of Chinese
dairy exports**

中国原奶价格偏高

Raw milk prices high in China

中国原奶价格高于主要出口地区新西兰、澳大利亚、美国，也高于欧洲多数国家。

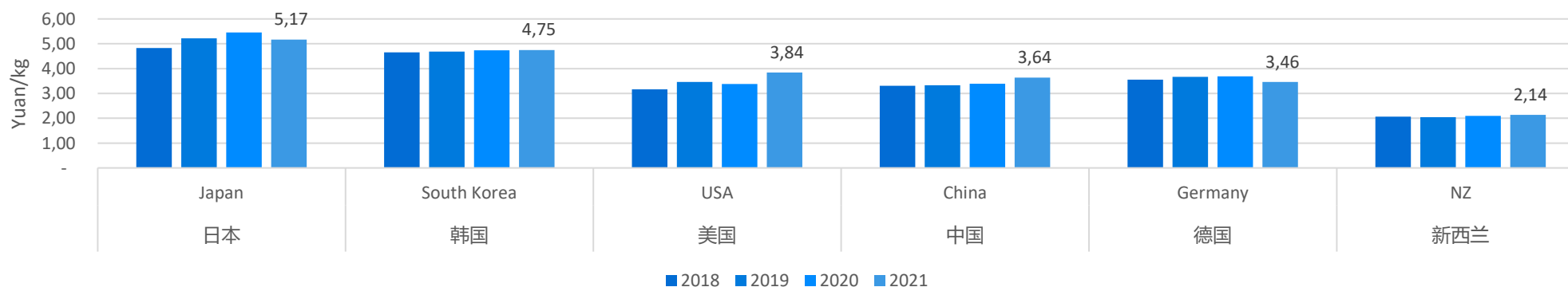
Raw milk price in China is higher than NZ, AU, US, most EU countries

在缺乏出口补贴的情况下，高昂的原料奶价格削弱了中国乳制品在国际市场上的竞争力。

In the absence of export subsidies, high raw milk prices have weakened the competitiveness of China dairy products in international markets.

Raw milk costs China VS Major countries 2018-2021

中国原料奶生产成本和主要国家比较2018-2021



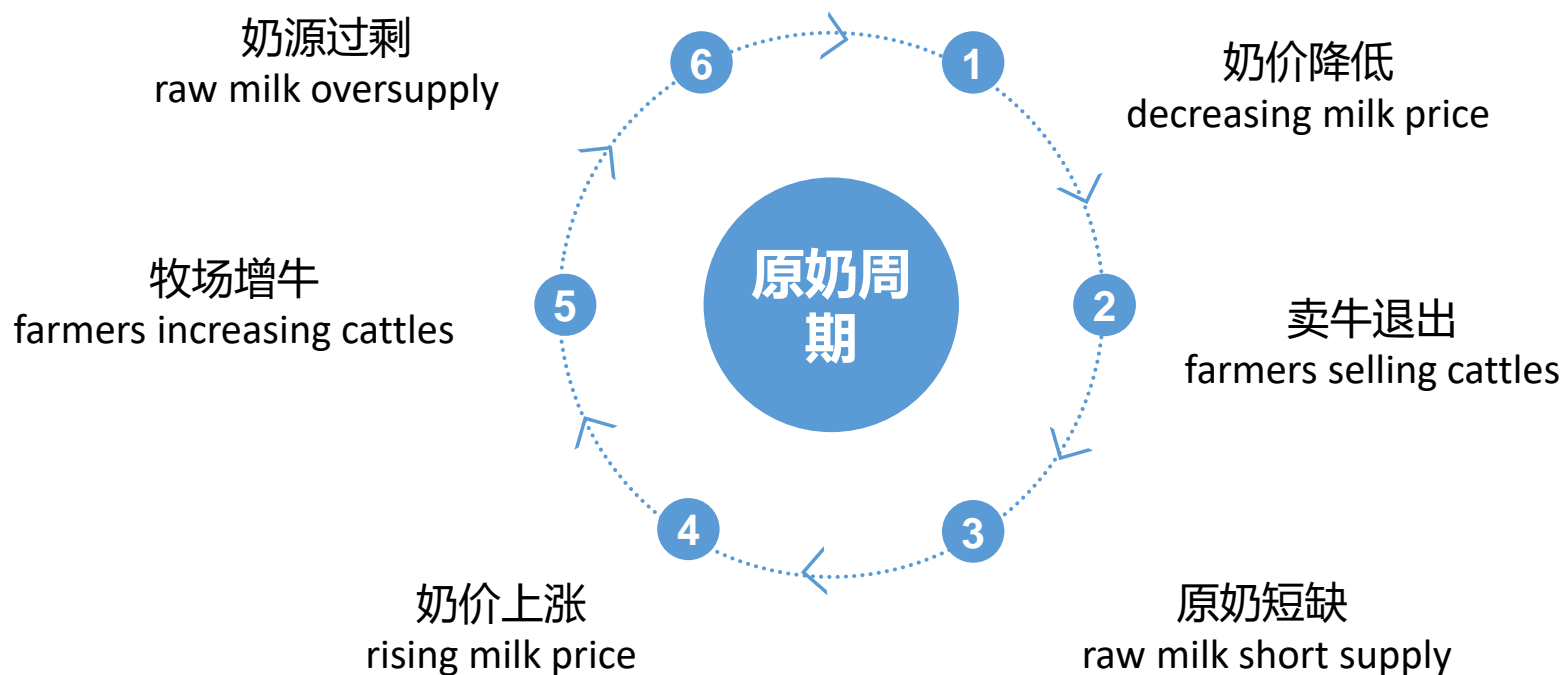
原奶供需周期性波动

Raw milk supply and demand fluctuate periodically

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中国奶业存在周期性波动，影响了乳制品的稳定供应和出口。

There are periodic fluctuations in China's dairy industry, which affect the stable supply and export of dairy products .



产品结构不合理

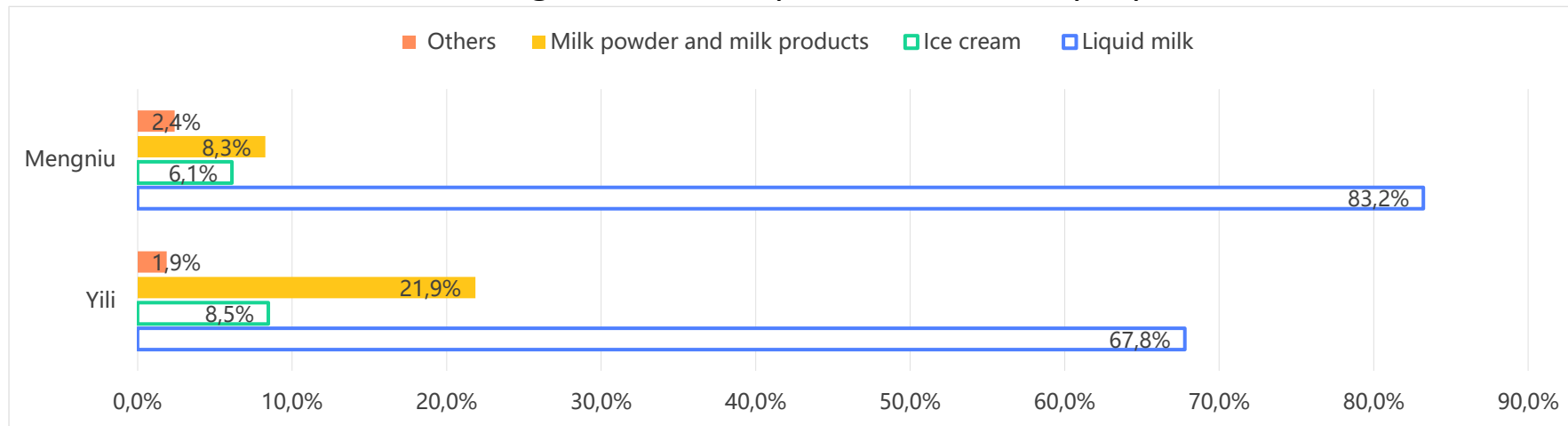
The product structure is not reasonable

中国乳制品产业以初加工为主，90%为液态奶，精深加工比例不足，产品结构不平衡。这种不合理的产品结构限制了乳制品的出口竞争力。

China's dairy industry is dominated by primary processing, 90% is liquid milk, the proportion of deep processing is insufficient, and the product structure is unbalanced. This unreasonable product structure limits the export competitiveness of dairy products .

伊利、蒙牛不同产品营收占比

Yili, Mengniu different product revenue proportion



品牌建设和市场认可不足

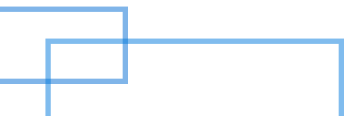
Insufficient brand building and market recognition

荷斯坦

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中国乳品企业在品牌建设和市场认可方面相对滞后，缺乏国际知名度和声誉，这使得它们在国际市场上难以与知名品牌竞争。

Chinese dairy companies are relatively lagging in brand building and market recognition, and lack international visibility and reputation, which makes it difficult for them to compete with well-known brands in the international market



结论

conclusion

未来中国依然是一个乳品进口国家

难以成为乳品出口国

China will remain a dairy importer in the future

It is difficult to be a dairy exporter



THANK YOU



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