Depth Analysis of China Broiler Market Status in 2013

Beijing Orient Agribusiness Consultants Limited

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Appendix

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3 Comparison between China’s Broiler Industry and International Broiler Industry

3.1 Comparison of Supply Capacity of Chicken among China, the US and Brazil

3.1.1 China’s Supply Capacity of Chicken

China is the second largest producing country of broiler, but the chicken mainly is supplied to domestic market, the import and export volume of chicken is small relative to production. In 2012, the production of chicken was about 13.78 million tons, while the import volume and export volume of fresh frozen poultry meat and offal respectively were 521.7 thousand tons and 194 thousand tons, accounting for 3.79% and 1.41% of the domestic production. Looked from the growth rate of China’s chicken production during the period from 2003 to 2012, the compound average annual growth rate was 3.9%. In normal years, the annual average growth rate of chicken production in China has passed 3%, higher than the average growth rate of global chicken production. But under the influence of abuse of antibiotics and H7N9 avian influenza, China’s chicken production sure will decrease. BOABC predicts that China’s broiler industry will recover from the influence of H7N9 avian influenza in 2014, and by 2017, the production of chicken in China is expected to reach about 15 million tons.
3.1.2 America’s Supply Capacity of Chicken

The US is the largest chicken producing country around the world, and also it is a net exporter of chicken, ranking the second in the world in terms of export volume of chicken. Broiler industry is the fastest developing industry in America’s animal husbandry and features industrial integration, scale enterprises, technology production, localization and in-depth processing. During the period from 2003 to 2012, broiler industry in the US showed a trend of decreasing of farms and expanding of raising scale, the production of chicken increased to 16.8 million tons in 2012 from 14.86 million tons in 2003, reaching compound average annual growth rate of 1.38%. Under the influence of financial crisis, growth of feed cost and Sino-US friction of chicken trade, the growth rate of chicken production of the US has slowed down since 2008. Broiler industry is highly developed in the US, the improving space of scale farming is limited, consumer demand for chicken was limited by slow economic resurgence of the US, so the increase of chicken production in the future will benefit from the improvement of broiler heredity which will make the average weight of broilers for slaughter improved and then the production of chicken will rise. BOABC predicts the average annual growth rate of chicken production in the US will maintain around 1% during the period from 2013 to 2017, and the production will reach 17.75 million tons in 2017.
Figure 3.2, America's Chicken Production, 2003-2017

Unit: 1,000 MT