中国在全球猪肉行业的竞争力、风险和可持续发展

China within the Global Pork Industry Competitiveness, Risk, and Sustainability

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概要
Overview

中国在世界市场上重要性
Importance of China in the world market

竞争力
Competitiveness

优势
Strengths

劣势
Weaknesses

计划
Projections
Year to July Imports

- United States
- Spain
- Germany
- Denmark
- Canada
- Other

Partner Country

每年前七个月进口
图1. 中国猪肉产品进口（左轴为价值）
Figure 1. Chinese Imports of Pork Products
(\$ value on left axis)
图2. 总成本（欧元/千克活体重）

Figure 2. Total costs (Euro/kg hot weight)
图3. 每头存栏母猪提供猪肉量（吨）

Figure 3. Tons of Pork per Sow in Inventory

- 中国 (China)
- 欧盟 (European Union)
- 美国 (United States)
优势

Enormous upside consumption potential, actual consumption is only 27.5 Kgs per person, this is about half of the official statistic.

China charges a duty of 12% to 20% on imported pork and does not allow processed pork imports, this is compounded by VAT.

Government provides significant direct subsidies.

Many in the Government are uncomfortable with a self sufficiency level below 95% and they will probably act to prevent imports beyond that.
劣勢
Weaknesses

產業集中到沿海省份，和人口聚集过于集中导致疾病压力
Industry is concentrated into the coastal provinces and is too close to population centers

Concentration leads to disease pressure

某些地区的地方政府关闭猪厂以防止气味和水污染
Local government in some areas are shutting down facilities to prevent odor and water pollution

中国消费者重视特定减税，这将促使脚和耳朵类产品大量长期进口
Chinese consumers place a premium on specific cuts such as the feet and ear, this will cause large and permanent imports of these products

中国的消费者很特别，他们愿意使用高价格的进口产品
Chinese consumers are unusual in that they are willing to pay a premium for imported product

CPI：消费猪肉指数，在通货膨胀中如果猪肉价格上扬，将鼓励进口
CPI: Consumer Pig Index, if pork prices cause an uptick in inflation, imports will be encouraged
Figure 6. Imports as a Share of Consumption 1990-2016
Bottom Line

If the Chinese pork industry can address its disease and productivity problems, then it can compete against imported products.

China will export its pig cycle and import large quantities of muscle meats in some years and will be a continuous importer of variety meats.

Government support is critical but this will be eroded if the reputation of the industry is damaged or production costs remain high (no more “pigs in the river” or feeding of illegal compounds).

If government support is reduced, then China could become a massive importer of pork, this will require long term contracts.
A Suggestion

Set voluntary industry standards for on farm practices that maximize food safety and meat quality and minimize welfare and environmental issues. (See PQS in the US)

Use this standard to create a "High Quality Pork Made in China" Brand

Advertise the attributes using funds collected from point of sale

Exclude pork from producers who do not meet high standards
英国退出欧盟和欧盟的难民危机

Brexit and the refugee crisis in the EU

英国已经是自由贸易协定背后重要推动力量，没有英国欧盟其他国家参加这些协定可能性小得多
The UK has been an important force behind free trade agreements and without it, the EU is much less likely to participate in these agreements

德国似乎不大可能让英国保持全面进入单一市场，除非英国愿意授予访问欧盟公民，这还没有明显的答案
It seems unlikely that Germany will allow the UK to maintain full access to the single market unless the UK is willing to grant access to EU citizens, there is no obvious answer here

一个可能的结果是欧盟猪肉很少有机会进入英国，反之亦然
A likely outcome is less access for EU pork in the UK and vice versa

英国可能愿意与美国和加拿大签署自由贸易协定的协议，这将打开美国和加拿大的产品市场
The UK might be willing to sign FTA agreements with the US and Canada, this would open the market for US and Canadian product

德国成功地将来自欧盟其他国家的移民整合到包装厂和养猪场，这有助于拓展德国猪肉行业
Germany has successfully integrated immigrants from other EU countries into packing plants and pig farms, this has helped the German pork industry to expand

但许多新移民都来自那些缺少猪肉行业国家，存在文化和语言障碍，这将使第二轮整合要困难得多
But many of the new immigrants are from countries that lack a pork industry and there are cultural and language barriers that will make a second round of integration much more difficult.
Impact of TPP

In the absence of TPP, it seems likely that other TPP countries will form bilateral, preferential arrangements. The US cannot afford to lose access to TPP countries and thus it seems likely that the US will sign the agreement sometime in the next three years. TPP should result in a gradual reduction in pork production in Japan and Vietnam and a modest increase in consumption, which will increase imports from the US, Canada and Chile.

Countries such as China, the EU and Brazil will be at a disadvantage unless they join. Preferential free trade agreements are viral.
Brazil

Southern Brazil is free of FMD and can now export to FMD free countries. Although the production cost is high due to the high labor cost, Brazil has a lucrative market in Russia, so expect a gradual increase in Brazilian pork production. While the production cost in the Center West of Brazil is very low, the area has FMD due to the comingling of beef cows with wild animals, this reduces export opportunities for Matto Grosso even if the infrastructural problems can be resolved.
俄罗斯
Russia

俄罗斯禁止进口来自美国、欧盟和加拿大的猪肉，这在世界市场上产生了百万吨顺差，对于巴西和俄罗斯的猪肉生产商是个机会
Russia banned pork imports from the US, EU and Canada and this created a one million ton surplus on world markets and an opportunity for Brazilian and Russian pork producers

欧盟猪肉涌入亚洲，但大部分猪肉是亏本卖到的
EU pork flooded into Asia, but much of this product was sold at a loss

最近欧盟出口到中国的猪肉激增使欧盟养猪业恢复盈利
The recent surge in EU pork exports to China brought the EU pork industry back to profitability

美国在消除生产中使用莱克多巴胺的行动非常慢，这给了欧盟在中国的竞争优势
The US has been surprisingly slow to eliminate Ractopamine from production systems and this has given the EU a competitive advantage in China

俄罗斯已接近自给自足，一旦它控制非洲猪瘟，他们将自给自足
Russia is close to self sufficiency and will get there once it controls African Swine fever