

Research Report of Chinese Soybean Industry, 2009

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2009

Description

The soybean industry concludes the departments and industries related to national economy, including the soybean production, trade, process, logistics, research and related service activities. The soybean industry chains are the longest one in Chinese mass agricultural products, covering planting, process, edible oil supplies, feed stuffs and breeding etc. After China's entry WTO, Chinese soybean industry experienced huge changes, even suffered from difficulties. On the one hand, the domestic soybean yields were reduced and the import dependency was increased to above 60%. On the other hand, the foreign funded enterprises controlled the crucial soybean process step with their strong capitals and technical strengths.

In the late 1980s, China, as the net soybean export country, could export 1.71 million tons in the highest year. From 1996, the domestic soybean yields were beginning to cut down. China had ever been the biggest soybean produce country in the world, which has been the history.

From 1995 to 2002, the annual imported soybean volumes showed the increasing trends, conversely, the reducing trend for the export volumes. In 2002, China imported 13.94-million-ton soybeans, near to the domestic soybean yield volumes. In 2003, the import soybean volumes in China reached to 20.74 million tons, the import volumes exceeding the domestic yields for the first time. The statistics showed that the soybean import volumes were increased year by year, which were 20.23 million tons in 2004, 26.59 million tons in 2005 and 28.26 million tons in 2006. In 2008, the soybean import volumes were 37.44 million tons, up by 259.3% compared with 10.42 million tons in 2000 with the annual growth rate of 173%. However, the domestic soybean yields were only about 15.5 million tons in 2008 in China.

Although China is the largest soybean import country in the world, the annual soybean import volumes exceeding 30 million tons, yet Chinese enterprises could not take part in the international price-making, only engage in the futures exchange in COBT and passively accept the price made by COBT. American enterprises has occupied over 90% of trade shares in the international soybean export market and mastered the soybean price-making in the world. Therefore, Chinese import dealers are adjusted by the market in soybean procurement, especially the large process enterprises depending on import soybeans to maintain the annual production, suffering from huge losses in the soybean trade.

From 2004, Chinese soybean process industry was almost lost. The international grain enterprises seized to enter China, occupied large part market without striking a blow and successfully finished the transformation from traders to process enterprises. In 2004, the domestic enterprises procured the soybeans at high price, but later, the soybean price was dropping sharply, leading to many Chinese import enterprises closed down.

For the soybean process step, the soybean self-sufficiency degree and the domestic soybean price are the major evaluation indicators. In China, the soybean self-sufficiency degree is less than 40%, and which continues to drop. The soybean price fluctuates greatly, especially with the influences of the imported soybeans.

At present, the major situation of the process step in Chinese soybean industry is: among the capital compositions of Chinese process industry, the foreign funds become the dominators. There are three goals for the foreign funded enterprises to control Chinese soybean process industry: one is to sell more soybeans to China; the other is to wipe out the competitors and occupy more market shares; another is to make Chinese enterprises become a chain to transfer profits and gain more profits in the international trade through Chinese market.

Many foreign funded grain and oil enterprises aim to set up complete agricultural means of production, agricultural product production, agricultural process and circulation industry chains, so as to gain more profits. By the end of 2008, 70% of oil process factories were foreign funded companies or joint ventures and 80% of soybean process capacity was held by multinational grain enterprises.

More following information can be obtained in this report:

- Yields and Change Trends of Chinese Soybeans
- Import Volumes and Change Trends of Chinese Soybeans
- Demands and Change Trends of Chinese Soybeans
- Present Development Situation of Chinese Soybean Processing Industry
- Distribution of the Foreign Funded Enterprises in Chinese Market
- Major Soybean Processing Enterprises and Their Operations in Chinese Market
- Market Competitions among Chinese Soybeans and Imported Soybeans
- Present Situation and Development Trends of the Genetically Modified Soybeans in Chinese Market
- Mergers and Acquisitions of Foreign Funded Enterprises in Chinese Soybean Processing Industry
- Prediction on the Development Trends of Chinese Soybean Industry

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