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TRENDS IN THE CHINESE POULTRY MEAT MARKET: PROSPECTS FOR THE UKRAINIAN EXPORTERS

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In recent decades, an increase in an average income and population has increased the production of all types of meat, of which poultry accounts for the largest share. In particular, chicken consumption is increasing significantly in fast-growing and densely populated countries such as China and India. Lower prices among other types of meat, the fast growth of chickens, efficient production, promotion of the beneficial properties of chicken and absence of religious restrictions are the main reasons for the growing popularity of this type of meat.

Ukrainian export of chicken meat will grow and exceed import in both volume and value, despite the possible threats and the unstable situation with the Covid-19. China's import orientation and the growing Chinese demand for finished products, together with the growth of production capacity and several advantages of Ukrainian chicken meat, give grounds to consider this trade cooperation beneficial for both parties.

The purpose of this article is to analyze the World, Chinese and Ukrainian chicken market, key trends and prospects, to provide recommendations for trade activities of these two countries in the market. The authors highlight the following main opportunities for poultry export from Ukraine to China: the introduction of new technologies in production, intensive investment in the development and construction of production facilities, the growth of poultry livestock and the emergence of new species. These opportunities will strengthen the price competitiveness of Ukrainian producers, Ukraine's market position among competing countries and improve cooperation with China.

Key words: China, Chinese market, poultry meat market, Ukrainian export, consumption, production.

Global meat consumption has been growing steadily for several decades. In 2019, global meat consumption amounted to 323.8 million tons, 47% more than in 1999 and 16% compared to 2009. According to FAO-OECD, the current consumption level is due to an increase in population and average income. The most popular types of meat are red meat (cattle, sheep), white meat (mostly poultry, and in some cases pork), and seafood (fish and shellfish). Last year, the most significant global meat consumption shares were poultry meat (40%) and pork meat (34%). [OECD-FAO Agricultural Outlook, 2020]. According to the FAO-OECD Outlook, 2020–2029 Global meat production is projected to expand by nearly 40 million tons by 2028 and 2029, reaching 364 million tons and 366 million tons respectively (figure 1) [OECD-FAO, 2020, *166*].

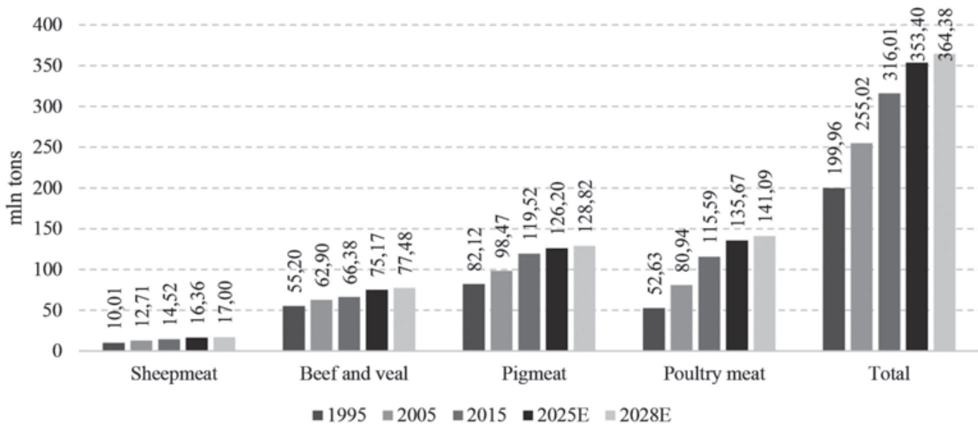

Figure 1. Global meat production, 1995-2028E (million tons)

Source: [OECD-FAO, 2019]

Among the analyzed types of meat, poultry moved from the third source of meat protein to the second. By 2030, chicken meat is estimated to be the first source of meat protein, accounting for 38% of the total [FAO, 2015]. The reasons for this forecast are the following: the price of poultry is lower than that of red meat; birds grow faster than other species; production is much effective; consumers have a positive perception of the nutritional properties of poultry meat; there are virtually no religious restrictions on consumption; the emergence of new alternatives to processed products.

Consumption is expected to increase significantly in rapidly growing and densely populated countries, as China and India. Because of cost-effectiveness, governments can also promote poultry production. Meat consumption per capita increased by 24% between 1995 and 2015 and is expected to rise by another 3.5% from 2015 to 2025 (figure 2).

Between 1995 and 2015, poultry meat increased from 31% per capita consumption to almost 40%, respectively (figure 2). On the contrary, beef consumption decreased from 24.6% to 18.9% and pork consumption from 38.6 to 36.6%. However, for a more detailed analysis, the difference in consumption between countries should be considered. For example, in the United States, people eat more than 95 kg of meat per year; in China – 50 kg, and only 2.9 kg in India. The difference in consumption is based on factors such as income, habits, traditions, and in Brazil's cases, climatic conditions. The information indicates that the increase in meat production and per capita consumption in developed and developing countries will continue. However, in different proportions, and the coming years this will be mainly due to increased consumption of poultry.

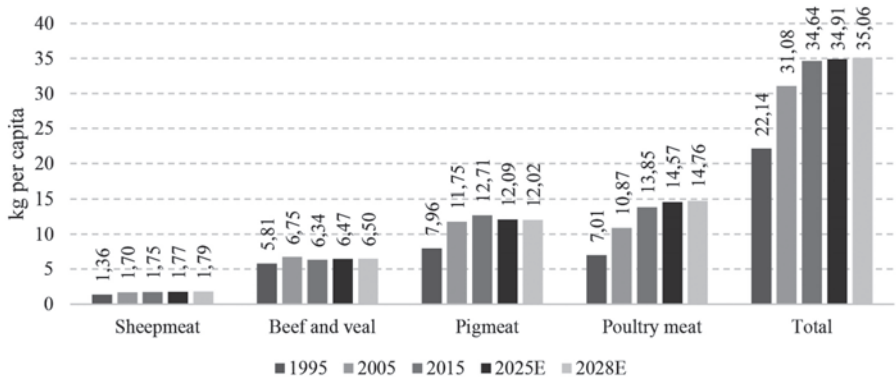

Figure 2. Global meat consumption per capita, 1995-2028E (in kg per capita)
Source: [OECD-FAO, 2019]

According to FAS USDA, the largest consumers of meat in 2020 are the United States (18%), China (16%), the EU (12%), Brazil (10%), and others; meanwhile, the largest producers of meat are the United States (20%), China (15%), Brazil (15%), and the EU (12%). The largest countries-importers of chicken meat are Japan (11%), China (10%), Mexico (9%), the EU (6%), Saudi Arabia (5%), and exporters – Brazil (32%), EU (12%), Thailand (7%), Turkey (4%), and Ukraine (3%) [FAS USDA, 2020)].

FAS USDA experts predict that chicken meat consumption in China will increase to 15.7 million tons in 2021, which is two per cent more compared with the previous year. Two main factors will affect this increase in 2021: pork prices and COVID-19. Pork consumption fell in 2019 when prices reached record highs, leading to a 20% increase in chicken consumption as an alternative. Chicken consumption will slow to the extent of recovering of pig herds and falling the pork prices. However, it will remain above the level during the African swine fever (ASF) due to several factors: consumption of poultry meat has already increased; the Chinese government and nutritionists are increasingly recommending people to consume more poultry meat. China's Healthy Eating Action Plan (2019–2030) was approved to set out the principles, namely the rejection of an unhealthy diet that contains too much salt, sugar, and fat, and is one of the leading risk factors for obesity, cardiovascular diseases, diabetes, and cancer. Therefore, although the availability of pork will increase, Chinese consumers have already changed their food habits in favour of chicken.

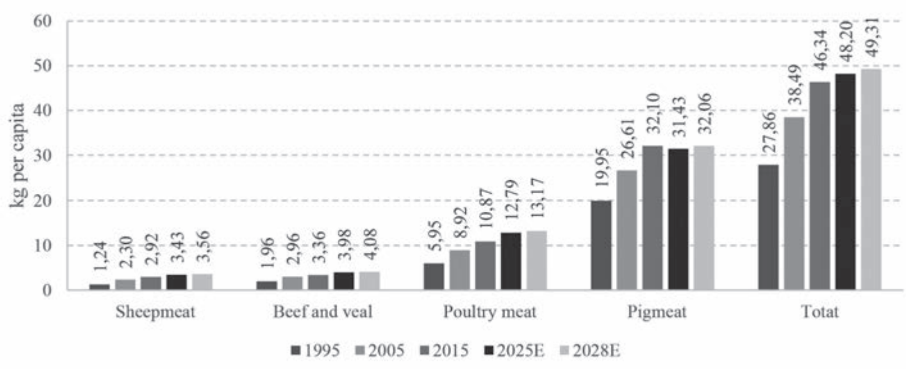

Figure 3. Global meat consumption per capita, 1995-2028E (in kg per capita)
Source: [OECD-FAO, 2020]

An increase is expected in the consumption of white, yellow broilers, and hybrid chicken. White broilers consumption in households and the food industry will increase in 2020, while in institutional structures and the catering sector, it will decrease due to COVID-19. Although the pandemic seriously affected white broilers' consumption in the first quarter of 2020, a nationwide economic slowdown will stimulate demand for poultry, especially white broiler meat, which is the cheapest meat. Traditionally, many Chinese consumers prefer yellow broiler meat because it is more fragrant and healthy than white broiler meat. Between pork and yellow-feather broiler, whose prices are similar, the Chinese choose the first option. Hybrid chicken overgrows and is smaller than a white broiler, making it suitable for three typical Chinese families. Expected popularity is to increase due to the growing number of Chinese consumers who order products online because of the problems caused by COVID-19, as it is mostly being sold as a ready-made dish.

The following events influenced the change in production: African swine fever virus in China in 2018, which created a shortage of meat protein in the market and changed the structure, as it gave impetus to the rapid expansion of the poultry industry; six highly pathogenic outbreaks of Avian influenza (HPAI); COVID-19, which affected both demand and production, as with the closure of restaurants, schools, canteens, and other food establishments, the demand for chicken meat fell significantly. According to the National Bureau of Statistics (NBS), poultry production in China in the first quarter of 2020 amounted to 5.23 million tons, which is 1.1% more than in the same period of 2019 much lower than expected growth rates. It is noteworthy that NSB statistics report about total poultry production, while broilers' relative growth would be slightly higher.

White and yellow broilers comprise more than 80% of China's total chicken production. The industry estimates that white-feathered broilers account for 50% of China's total chicken production and yellow-feathered broilers for 32% (see Figure 4). White broiler production is concentrated in the North, led by Shandong Province, and yellow broiler production is concentrated in the South, led by Guangdong Province [FAS USDA, 2020].

White broiler production is expected to continue to increase in 2021 due to large recent investments in poultry production, as it will add significant new capacity, which will cause concern in a certain poultry industry due to oversupply. According to the FAS USDA, the production of yellow-feather chicken will be stable in 2021. Yellow broilers vary in species, price, and breeding cycles. They come from native species, so all their genetics can be made in the country.

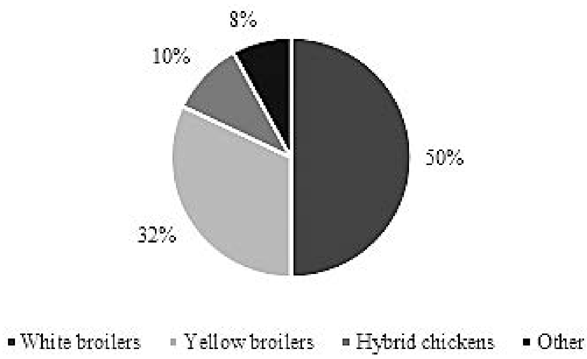

Figure 4. Poultry production in China in 2020, %

Source: [FAS USDA,2020]

Starting in 2019, declining pork supplies and further increasing demand for poultry have led to the expansion of the yellow broiler industry. However, by 2020, this expansion began to slow due to the recovery of the pig herd in China and the outbreak of COVID-19.

In addition, the production of hybrid chicken, according to FAS USDA, will grow rapidly. The hybrid chicken (known as “817 chicken”) is a unique Chinese variety. It originated in Shandong Province and was mainly bred to supply the processing industry. In Shandong, there is a very famous regional dish called Dezhou braised chicken. This product has reached national popularity: ready-to-eat whole chickens are ordered through e-commerce across the country. This variety grows rapidly (35-45 days), so production costs (chickens and feed) are only 40-50% of white broilers. As a result, the production and consumption of hybrid chicken have expanded rapidly in recent years and will become stable [FAS USDA, 2020].

FAS USDA experts forecast chicken export to China by 2021 by 420 000 tons, which is a 12% increase in comparison with an estimated 375,000 tons in 2020. As China’s domestic production continues to grow but demand slows, the Chinese industry will focus on increasing exports. China’s main export markets are Japan and Hong Kong, which account for about 80% of China’s total chicken exports. Chicken import is projected to decline by 16% to 775,000 tons in 2021, mainly due to lower domestic prices. Demand for new orders also began to decline because of the increasing effects of COVID-19. Import in the second half of 2020 is predicted to be restricted by existing high stocks of imported products, large domestic production, and weaker market demand due to prolonged restrictions of COVID-19. China has also inspected food stocks, most of which focus on imported products, especially poultry. The current list of exporters has been approved by the PRC’ Bureau of Import and Export Food Safety [General Administration of Customs of the People’s Republic of China, 2020].

Among exporters, Brazil will continue to be China’s leading supplier in 2021. However, its market share is expected to decline as access to its competitor’s increases. According to China’s Customs Service, importing China’s chicken from Brazil in 2019 accounted for 72% of China’s total imports. However, in the first five months of 2020, the Brazilian market share fell by 10%. For example, the decrease in the share was due to an increase in imports from the United States after lifting the ban in November 2019. From January to May 2020, China became the third-largest exporter of American chicken meat [FAS USDA, 2020].

Considering China’s import-orientation, Ukraine’s export potential, and changes in the world economy, in the markets of these two countries, in particular, the possibilities of their cooperation should be considered, namely trade in the chicken market. Analysis of the production capacity of the exporting country is the following: large industrial producers dominate poultry production in Ukraine. In 2020, the share of chicken produced on large industrial farms increased by another per cent, reaching 89% of chicken production. The industrial production of chicken meat in Ukraine is very concentrated. The MHP group is the largest producer with a 60% share of the market. There are six much smaller producers which occupy the other 30% of the market – Dniprovskyi poultry breeding complex, the agro-industrial group “Pan Kurchak”, Company “Agro-Oven”, PRJSC “Volodymyr-Volynskyy Poultry Farm”, LLC “Western trading resource”, PLC “Agromars Complex”. Less than 9% are concentrated in a large number of small farms. In most cases, large chicken producers grow their feed crops, have their elevators, mixed fodder factories, incubator houses, slaughterhouses, and others for the full production cycle.

Ukrainian chicken producers consume more than 60% of the feed produced. Despite the challenging weather conditions and the expected lower yield of fodder crops in the South of Ukraine, there will be no shortage of fodder in poultry in the 2020/21 season. Ukraine will remain the leading producer and exporter of feed crops, and, consequently, chicken producers will continue to prioritize their advantage in fodder prices.

Domestic and world chicken prices have declined in 2020. Strict quarantine measures related to COVID-19, introduced by the Ukraine Government in early March 2020, have led to a significant fall in demand from food and hotel businesses. Retail demand suffered slightly but quickly returned to normal. Ukrainian cafes and restaurants were allowed to resume limited service on outdoor terraces in mid-May and return to full service at the end of June [FAS USDA, 2020a]. These measures, together with the growth of export, led to a specific stabilization of prices. However, domestic and export prices remain 10-20% below 2019 levels. There is considerable uncertainty in significant destination markets in the EU and Asia due to concerns about the second wave of COVID-19 spreading. Lower than usual, the price level still allows to profit on production and maintain the necessary levels of domestic sales and exports.

Poultry, the mainly chicken, remains the primary source of animal protein for the population. The level of poultry consumption in Ukraine in 2020 is likely to increase by 2.5%. The economic downturn associated with COVID-19 hurts income levels and widens the gap between poultry and red meat prices, which will increase poultry consumption. It is expected that these factors will have an impact on consumption in the year 2021, which is why domestic consumption will increase.

In 2020/21, Ukraine will remain both a great exporter and a great importer of chicken meat. Trade flows between countries take place in the following way: expensive pieces of chicken and a whole chicken are exported, while chicken by-products are imported. That is explained by the low level of per capita income of Ukraine. The recent increase in domestic by-products production is expected to reduce imports. Export is likely to increase in both 2020 and 2021 due to the growth of small and medium-sized producers and the efficient use of capacity by the largest producer, the MHP Group. The export will continue to exceed imports both in volume and especially in value terms.

According to the FAS USDA, Ukraine is expected to slightly increase chicken exports in 2020 and 2021, despite economic turbulence both domestically and internationally. Low-cost prices will be the main reason for the growth of production and export. The available indicators show an increase in production in January-June 2020, despite a slight decline in production in March and April. However, this forecast may change due to the situation with COVID-19.

Ukraine's largest chicken producer, the MHP Group, is expected to remain the largest exporter, accounting for almost 90% of all chicken export from Ukraine. In the last months of 2020, Ukraine is likely to focus on existing markets in Asia, the post-Soviet, and African's states. However, Ukraine wouldn't start exporting chicken to Japan or agree to enter the Chinese market by the end of 2020, although both markets may become available in 2021.

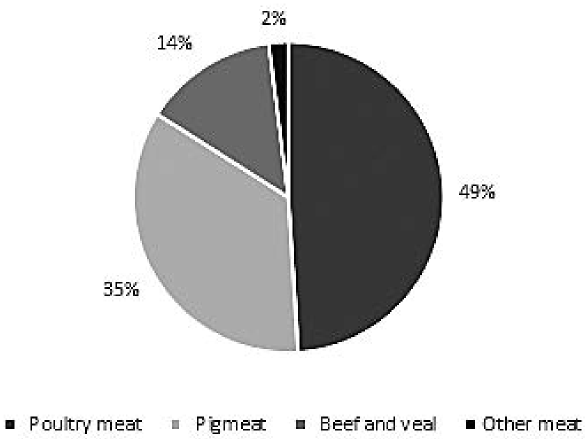

Figure 5. Consumption per capita in Ukraine in 2019, %

Source: [State Statistics Service of Ukraine, 2020]

By introducing a smaller quota in 2019, the EU continues to lose its role as the main importer of Ukrainian chicken meat. Its share decreased from 35% in 2018 to 16% in 2020. Therefore, the Middle Eastern countries are rapidly becoming important as export destinations for Ukrainian chicken of the highest category (mostly a whole chicken meat). The situation is not expected to change in 2021.

Significant export growth of the meat highest category meat in recent years would not have been possible without the mass import of by-products, which replaces exported chicken meat in the domestic market. In the past, Ukrainian chicken producers have shown small interest in the domestic by-products market due to low profits. However, the growth of domestic production and processing has increased the production of by-products. These additional production facilities, launched in late 2019, led to a fall of imports in 2020, which is also predicted for 2021 [FAS USDA, 2020a].

EU countries remain the only source of cheap chicken by-products. For several years, EU imports have also been an essential political argument in negotiations on a new Ukrainian export tariff.

Table 1

SWOT-analysis of the Ukrainian chicken producer on the Chinese market

Strengths	**Weaknesses**
− intensive investments in the development and construction of production facilities with a high level of efficiency; − introduction of the latest technologies in production; − full production process: from grain growing to feed production and from hatching egg production to the sale of final products; − growth of poultry livestock; − use of zoning practice as a method of preventing the spread of diseases in the workplace; − low production costs; − wide sales network in the domestic market.	− quality (use of antibiotics); − high level of consumption in the domestic market and a low share of export; − high market concentration; − narrow range; − dependence on the grain market.
Opportunities	**Threats**
− large Chinese market; − export-oriented Chinese market; − increase in demand due to the weakening of quarantine; − growing Chinese demand for finished products; − growing Chinese demand for first-class products; − increase in Ukrainian exports (increase in the share of export in consumption); − reduction of the level of consumption in the domestic Ukrainian market due to the strengthening of quarantine, the ability to quantitatively meet the consumer needs of the Chinese market; − new importer of by-products; − feed trade; − launching of additional production facilities.	− stricter rules for the selection of exporters (embargo, technical barriers, sanitary and epidemiological rules, and norms); − bureaucratic procedures (both on the Ukrainian and Chinese sides); − low level of recognition of Ukrainian producers by Chinese consumers; − the emergence of new competing countries; − COVID-19 and production reduction; − high level of consumption in the domestic Ukrainian market and inability to provide export; − climate change, crop failure; − strengthening the Chinese national producer; − difficulties in raising new species of poultry that are not typical of Ukrainian producers; − the emergence of substitute products (for example, a new type of chicken, artificial meat).

With the introduction of the latest production technologies, it is possible not only to improve product quality, increase production, which is already growing, and reduce costs but also to provide the opportunity to grow different types of chickens and be ready to adapt to new market conditions (the emergence of new species, which is claimed by the Chinese national manufacturer more often). Besides, achieving these goals will also help to overcome the strict selection of exporters, technical barriers and prevent possible embargoes.

Case Study
"Chicken Kyiv" in Ministop, Japan

A recent example from the Japanese network "Ministop" proved that Ukrainian chicken dishes have a worldwide significance.

On December 4, the Ukrainian national dish "Chicken Kyiv" was sold in more than 1,700 round-the-clock Ministop stores. On social networks, Japanese consumers leave only positive reviews about this chicken dish, noting its pleasant taste, crispy crust and tender sauce inside.

This gives reason to believe that Ukrainian chicken dishes have a great competitive potential for export [Ministop, 2020].

The full production process (from grain growing to feed production and from hatching egg production to the sale of final products) helps to be independent of import at all stages of production, provides an opportunity to create a market offer not only by a chicken but also raw materials, eggs, by-products, and finished products, the demand for which is now growing steadily.

With intensive investment in the development and construction of production facilities with a high level of efficiency, the Ukrainian producer will be able to meet the growing demand in both its own and Chinese markets, thereby change the percentage of domestic consumption with export. This weakness will strengthen by the quarantine conditions for a period of time, which will last longer in Ukraine than in China, which will affect consumer demand in the two countries.

Increasing demand not only for by-products but also for high-quality products with rising incomes, especially after the lifting of quarantine, in the large export-oriented Chinese market will stimulate the launch of additional production capacity of both Ukrainian producers and other countries, including China. Under such conditions, there will be more opportunities for sales. However, the number of competitors will also increase.

The growth of poultry livestock, the lowest production costs will strengthen the price competitiveness of Ukrainian producers, which will strengthen its market position among competing countries and domestic producers and, accordingly, increase Ukrainian exports. However, dependence on the grain market, namely climatic conditions, jeopardizes this advantage.

In order to stand out from other competitors and solve the problem of the emergence of a national producer, it is necessary to cooperate on a barter basis. After the loss of the EU's title of Ukraine's first importer of by-products, China should be considered to take this place, which could improve relations between the countries and be beneficial for both parties.

In conditions of uncertainty due to COVID-19, there may be problems of reducing the production of Ukrainian producers and fears to export products from China's perspective. Currently, the situation is stable, outbreaks of the epidemic at

Ukrainian factories have not been documented, and production is growing due to the use of additional capacity.

However, an increase in supply can also negatively impact, as outbreaks such as chicken flu can cause significant losses. This threat can be overcome by the practice of zoning, which, for example, the MHP group uses with the European Union, the United Arab Emirates and a number of other countries.

The high concentration in the Ukrainian market is one of the unresolved problems, which threatens the ability to meet consumer demand. In the case of the mentioned problems of the largest Ukrainian producer, a larger share of the domestic market will suffer, and export will significantly reduce, thereby jeopardizing cooperation between the two countries.

The Ukrainian manufacturer can face many difficult challenges during the entry into the market, such as the task of strengthening its position, taking place, ensuring brand awareness by Chinese consumers. Therefore, Ukrainian manufacturers should establish contacts, convince the profitability, reliability of cooperation and import of our products, using a B2B strategy, to actively participate in export and import fairs in China, which are now held online. The government and diplomatic channels should also be involved in promoting Ukrainian products in the Chinese market, lobbying Ukrainian companies' interests, providing state guarantees, and other measures from the state's arsenal, as the United States and Brazil do. In the short term, Ukraine needs to firmly establish itself in the capacious market of the importing country. For this purpose, Ukrainian companies should pursue an active policy of combating competitors through key benefits and effective marketing policies. It is necessary to consider the national characteristics of the Chinese market, for example, due to niche products – yellow broilers and hybrid chickens.

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ТЕНДЕНЦІЇ КИТАЙСЬКОГО РИНКУ М'ЯСА ПТИЦІ: ПЕРСПЕКТИВИ ДЛЯ УКРАЇНСЬКИХ ЕКСПОРТЕРІВ

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Протягом останніх десятиліть збільшення середніх доходів та кількості населення підвищило виробництво всіх видів м'яса, з якого курятина становить найбільшу частку. Зокрема, споживання курятини суттєво збільшується в густонаселених країнах, які швидко зростають, такі як Китай та Індія. Нижча ціна з-поміж інших видів м'яса, швидкі темпи росту курей, ефективне виробництво, відсутність релігійних обмежень та просування корисних властивостей курятини – основні причини зростаючої популярності даного виду м'яса.

В Україні зростатиме експорт курячого м'яса, який переважатиме імпорт як за обсягом, так і у вартісному вираженні всупереч можливих загроз та нестабільну ситуацію з пандемією Covid-19. Імпортна орієнтованість Китаю та зростання китайського попиту на готову продукцію, разом із зростанням виробничих потужностей та низки переваг м'яса курятини українських виробників, дають підстави вважати їх торгівельну співпрацю вигідною для обох сторін.

Метою даної статті є дослідження світового, китайського й українського ринку курятини, ключових тенденції та перспектив, надання рекомендацій щодо торгівельної діяльності цих двох країн на ринку. Серед основних можливостей експорту курятини з України в Китай автори виділяють: упровадження новітніх технологій на виробництві, інтенсивні капіталовкладення в розвиток та будівництво виробничих об'єктів, зростання поголів'я птиць та поява нових видів. Ці можливості посилять цінову конкурентоспроможність українських виробників, зміцнять позицію України на ринку серед країн-конкурентів та покращить співробітництво з Китаєм.

Ключові слова: Китай, китайський ринок, ринок м'яса птиці, український експорт, споживання, виробництво.

ТЕНДЕНЦИИ КИТАЙСКОГО РЫНКА МЯСА ПТИЦЫ: ПЕРСПЕКТИВЫ ДЛЯ УКРАИНСКИХ ЭКСПОРТЕРОВ

В. Е. Осадчук, В. А. Шайдецкая, О. В. Дроботюк

В течение последних десятилетий увеличение средних доходов и численности населения увеличило производство всех видов мяса, из которого курятина составляет наибольшую часть. В частности, потребление курятины существенно увеличивается в густонаселенных странах, которые быстро растут такие, как Китай и Индия. Низкая цена среди других видов мяса, быстрые темпы роста кур, эффективное производство, отсутствие религиозных ограничений и продвижение полезных свойств курятины – основные причины растущей популярности данного вида мяса.

В Украине будет расти экспорт куриного мяса, который превысит импорт как по объему, так и в стоимостном выражении, вопреки угрозам и нестабильной ситуации с пандемией Covid-19. Импортная ориентированность Китая и рост китайского спроса на готовую продукцию вместе с ростом производственных мощностей и ряда преимуществ мяса курицы украинских производителей дают основания считать их торговое сотрудничество выгодным для обеих сторон.

Целью данной статьи является исследование мирового, китайского и украинского рынка курятины, ключевых тенденций и перспектив, предоставление рекомендаций по торговой деятельности этих двух стран на рынке. Среди основных возможностей экспорта курятины из Украины в Китай авторы выделяют: внедрение новейших технологий на производстве, интенсивные капиталовложения в развитие и строительство производственных объектов, рост поголовья птиц и появление новых видов. Эти возможности усилят ценовую конкурентоспособность украинских производителей, укрепят позиции Украины на рынке среди стран-конкурентов и улучшат сотрудничество с Китаем.

Ключевые слова: Китай, китайский рынок, рынок мяса птицы, украинский экспорт, потребление, производство.

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