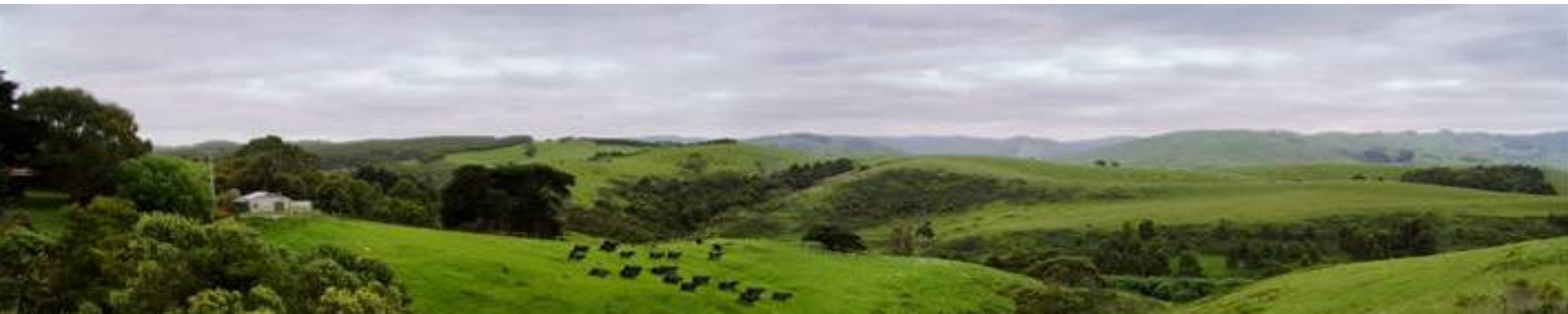


扩大红肉产业合作伙伴

Enhancing the red meat partnership



Australia – China
Free Trade Agreement



今天的议题 Today's discussion

- **澳大利亚牛肉产量及出口**
Australian beef production & exports
- **澳大利亚羊肉产量及出口**
Australian sheepmeat production & exports
- **质量保证体系**
Quality assurance systems

统计数字比较 Comparative statistics

澳大利亚
Australia

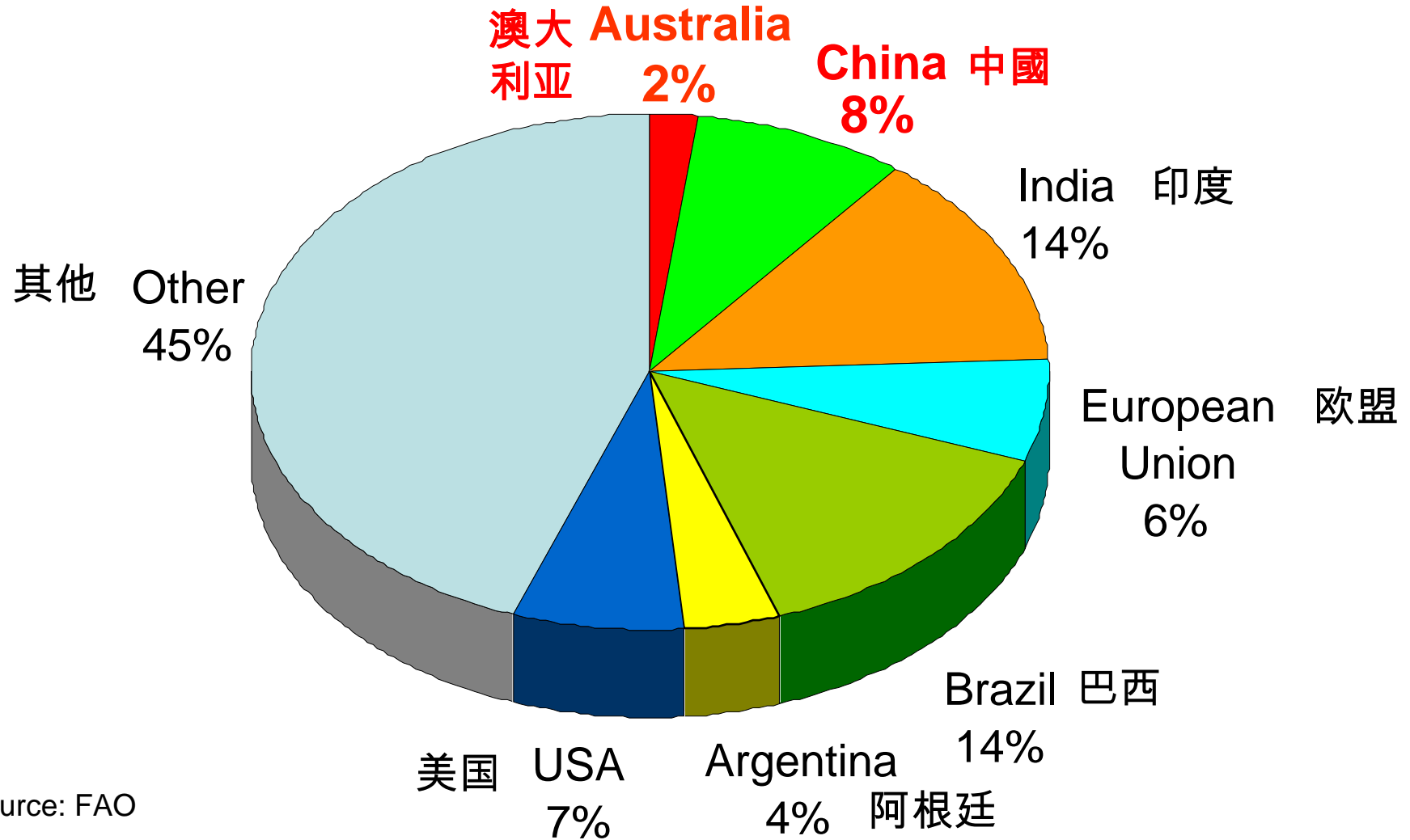
中国
China

| | | |
|--|------|------|
| Cattle numbers (millions) 肉牛只数目 (百万) | 28 | 115 |
| Sheep numbers (millions) 羊只数目 (百万) | 101 | 171 |
| Beef production (m tonnes) 牛肉生产量 (百万吨) | 2.1 | 6.8 |
| Beef exports % production 牛肉出口百份比 | 65% | 1% |
| Beef consumption (kgs) 牛肉消耗量 | 35.4 | 4.9 |
| Sheep/goat consumption (kgs) 羊肉消耗量 | 13.6 | 2.4 |
| Poultry consumption (kgs) 鸡肉消耗量 | 37.7 | 10.9 |
| Pork consumption (kgs) 猪肉消耗量 | 22.1 | 35.3 |

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世界牛只数量比较 World cattle numbers

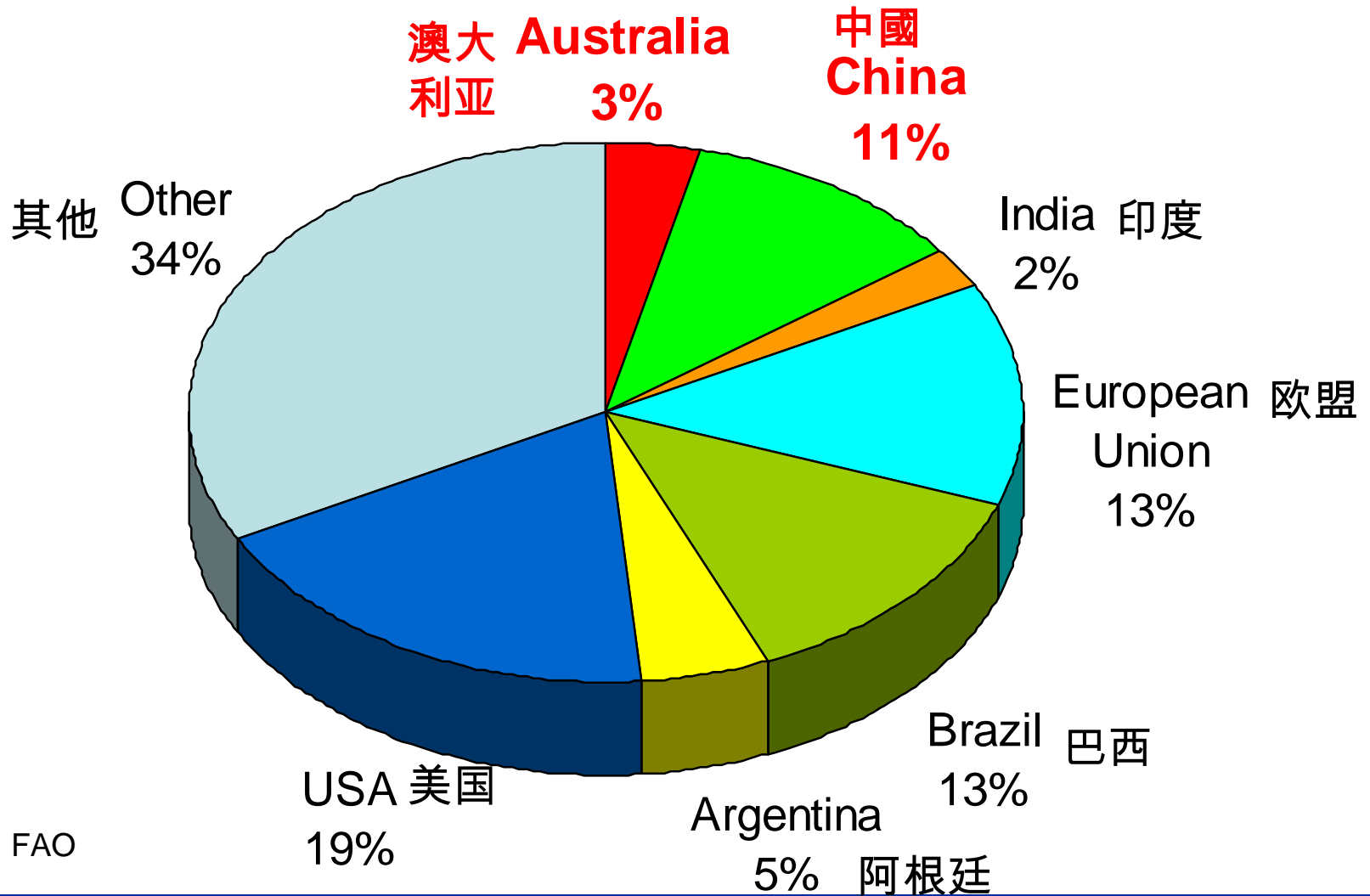


Source: FAO

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世界牛肉产量 World beef production

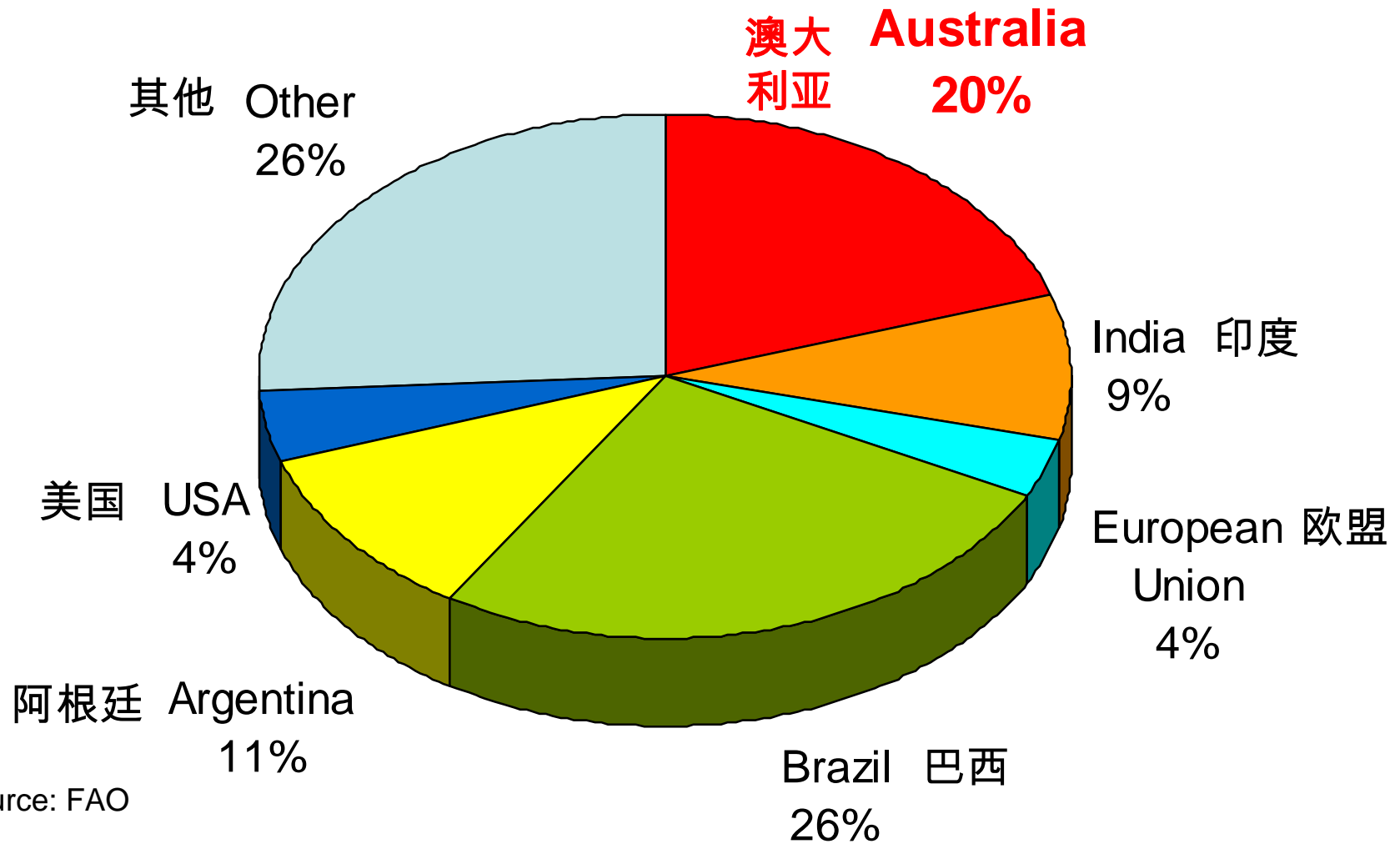


Source: FAO

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世界牛肉出口 World beef exports

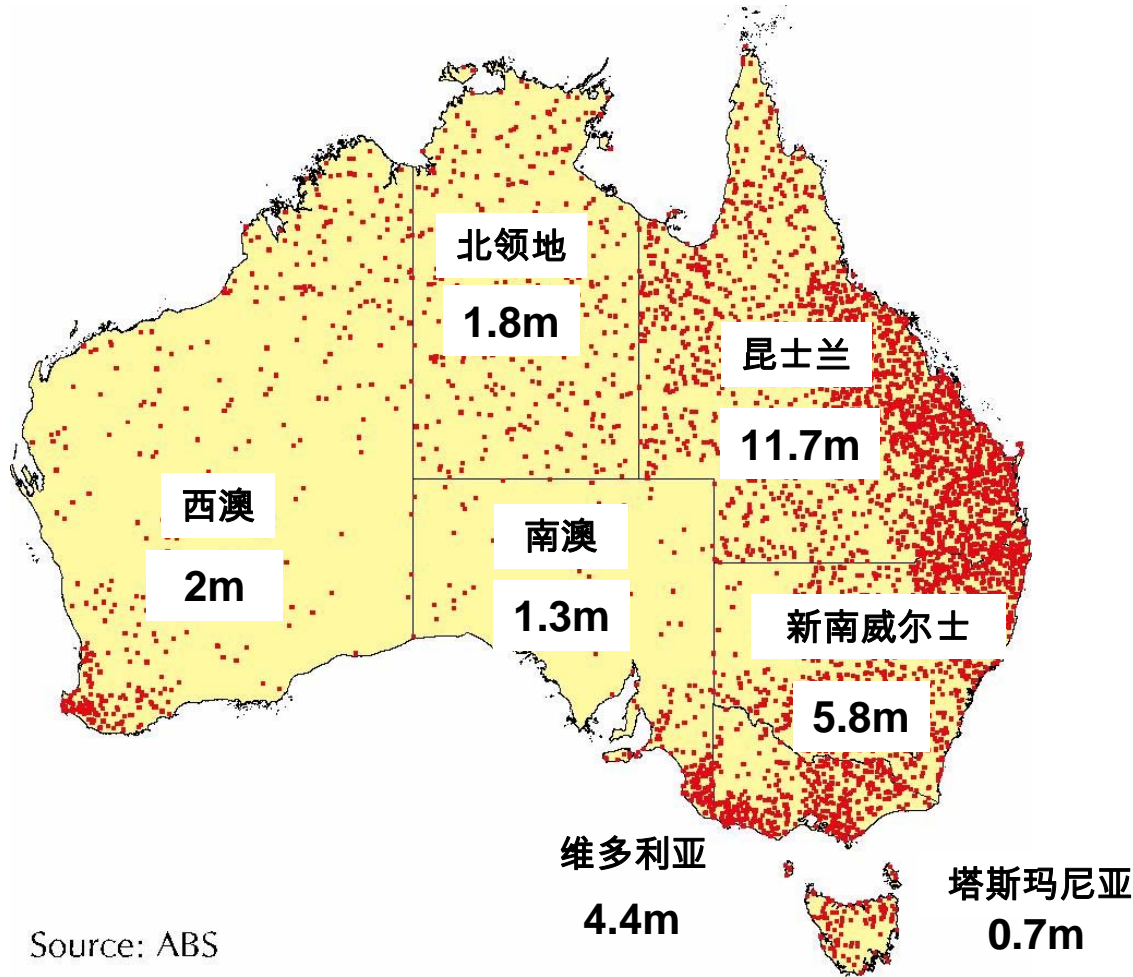


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澳洲牛只分布 Australian cattle distribution

27,700,000头 27.7 million head (2005)



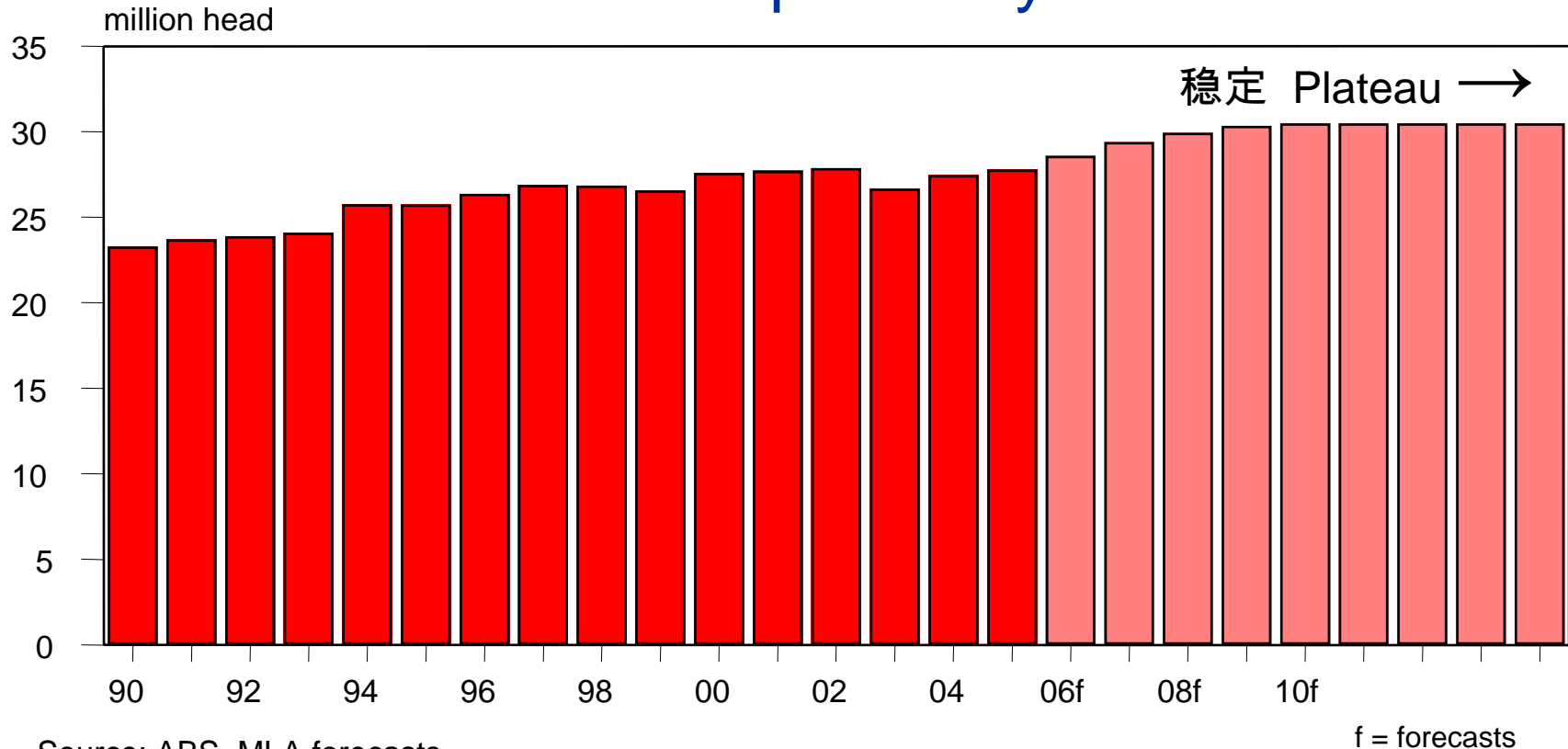
Source: ABS

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在过去的25年里，澳大利亚牛只数目一直非常稳定

Australian cattle herd has been reasonably constant over the past 25 years



约60%的澳大利亚牛只是草饲的

About 60% of Australian beef is raised exclusively
on grass pastures

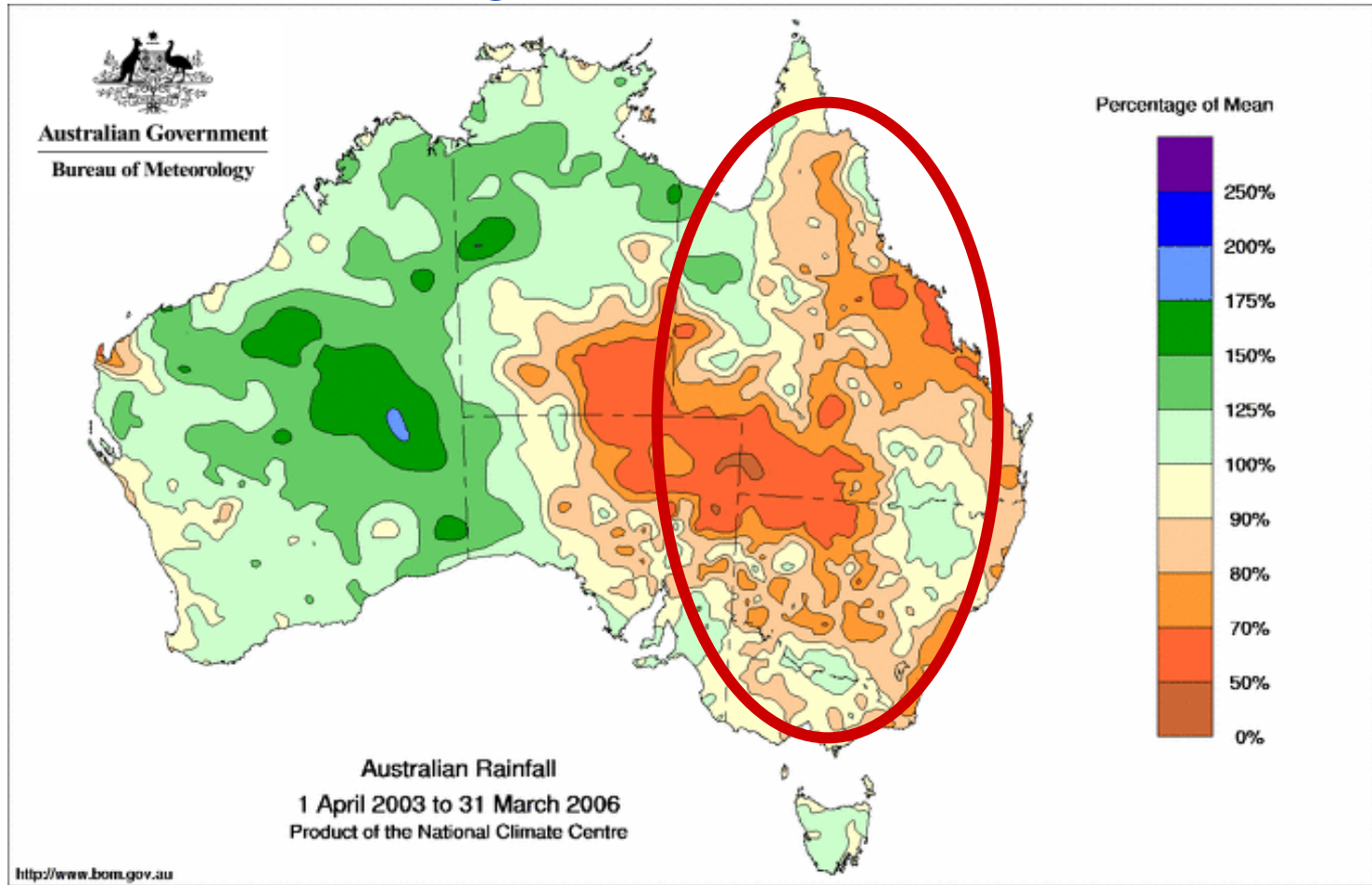


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气候对产量的影响非常大

Climate has a significant impact on production

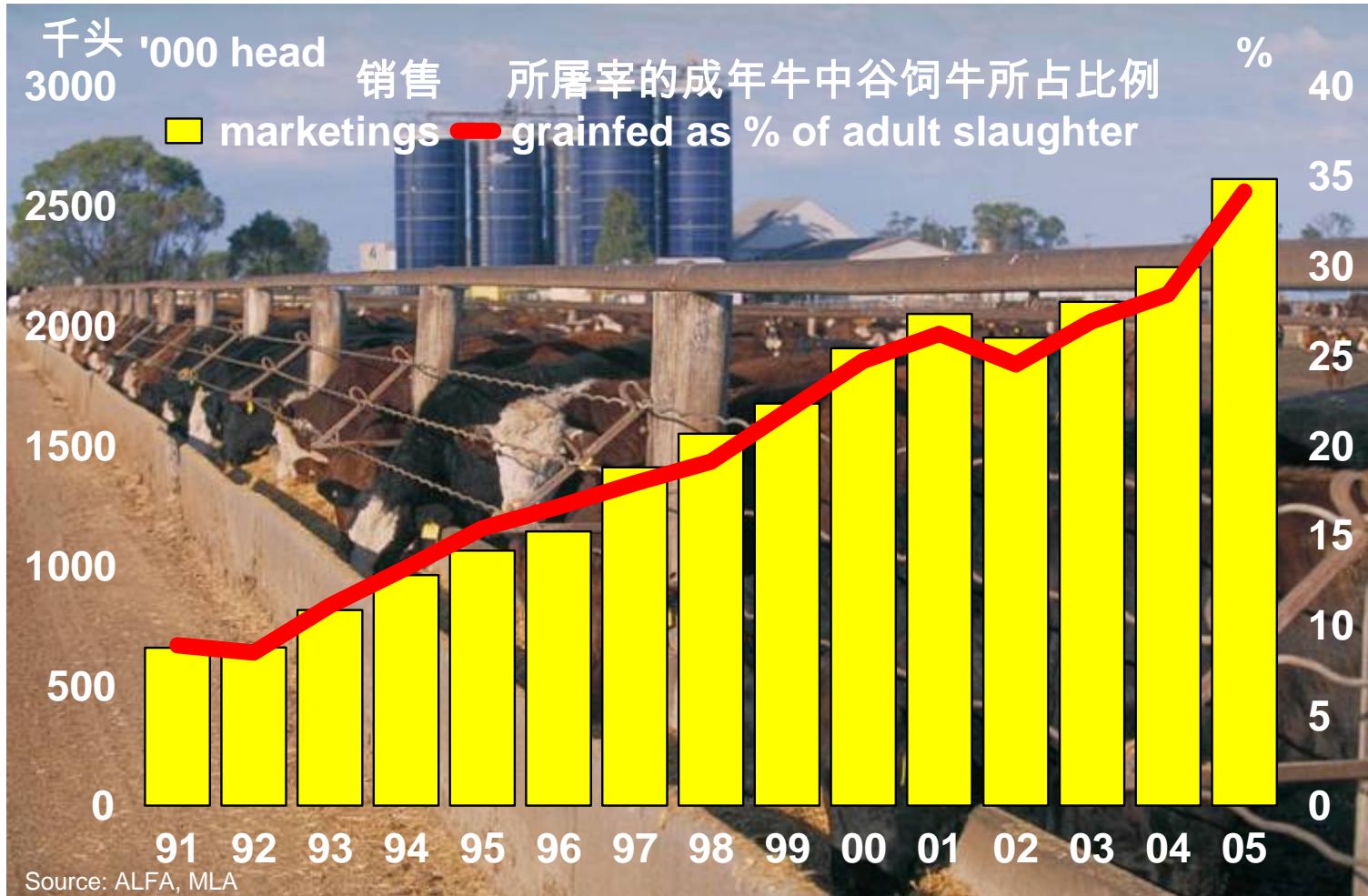


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谷饲牛肉日趋重要

Growing importance of grain finishing



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澳大利亚牛肉使用比例

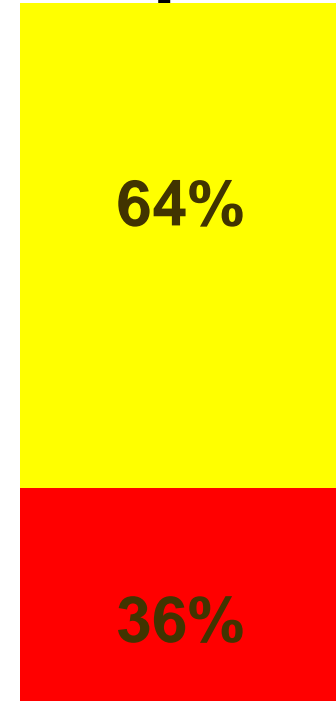
Utilisation of Australian beef



Export
出口

Domestic
内销

吨 装载重量
909,395 tonnes sw

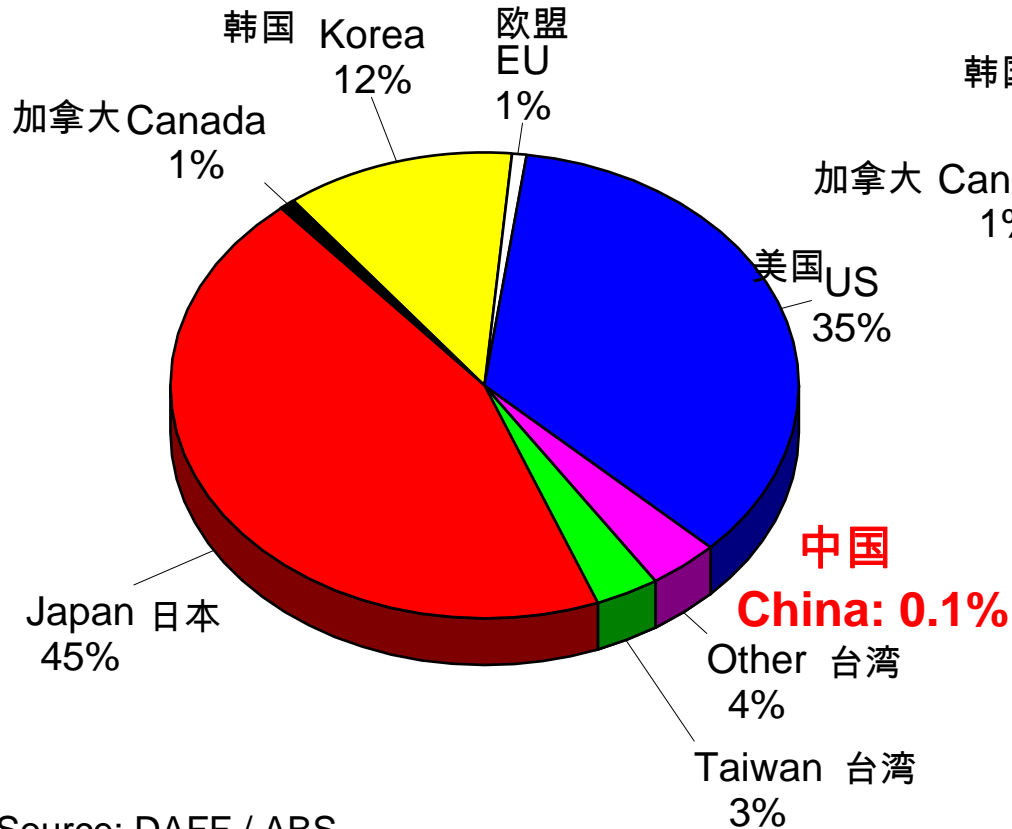


35 kgs /人 / head

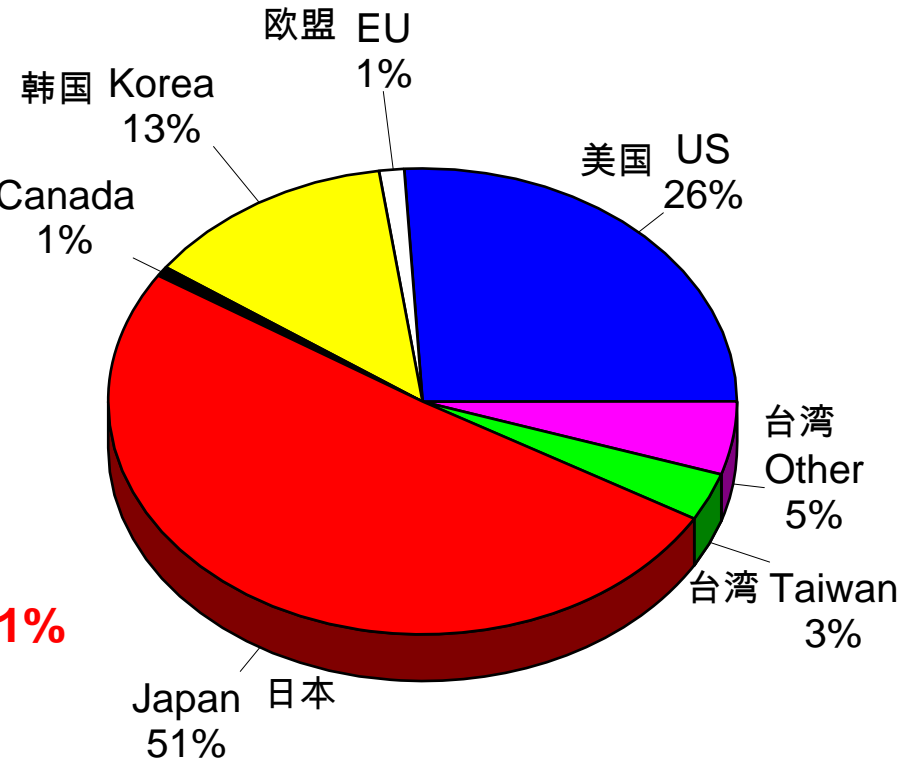
2005 年澳大利亚牛肉出口目的地

Australia's beef exports 2005

量 Volume



价值 Value



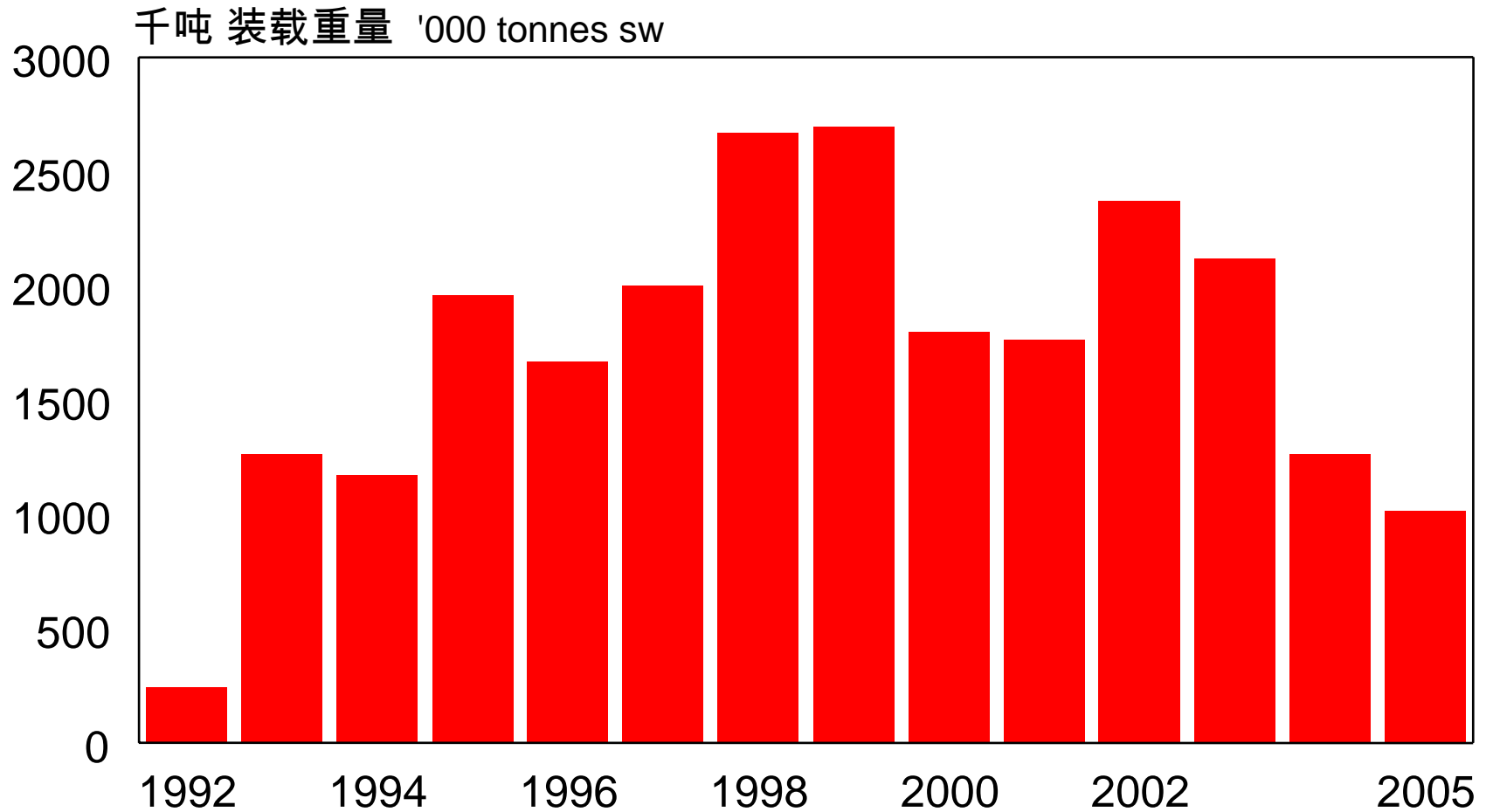
Source: DAFF / ABS

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出口到中国的澳大利亚牛肉

Australian beef exports to mainland China

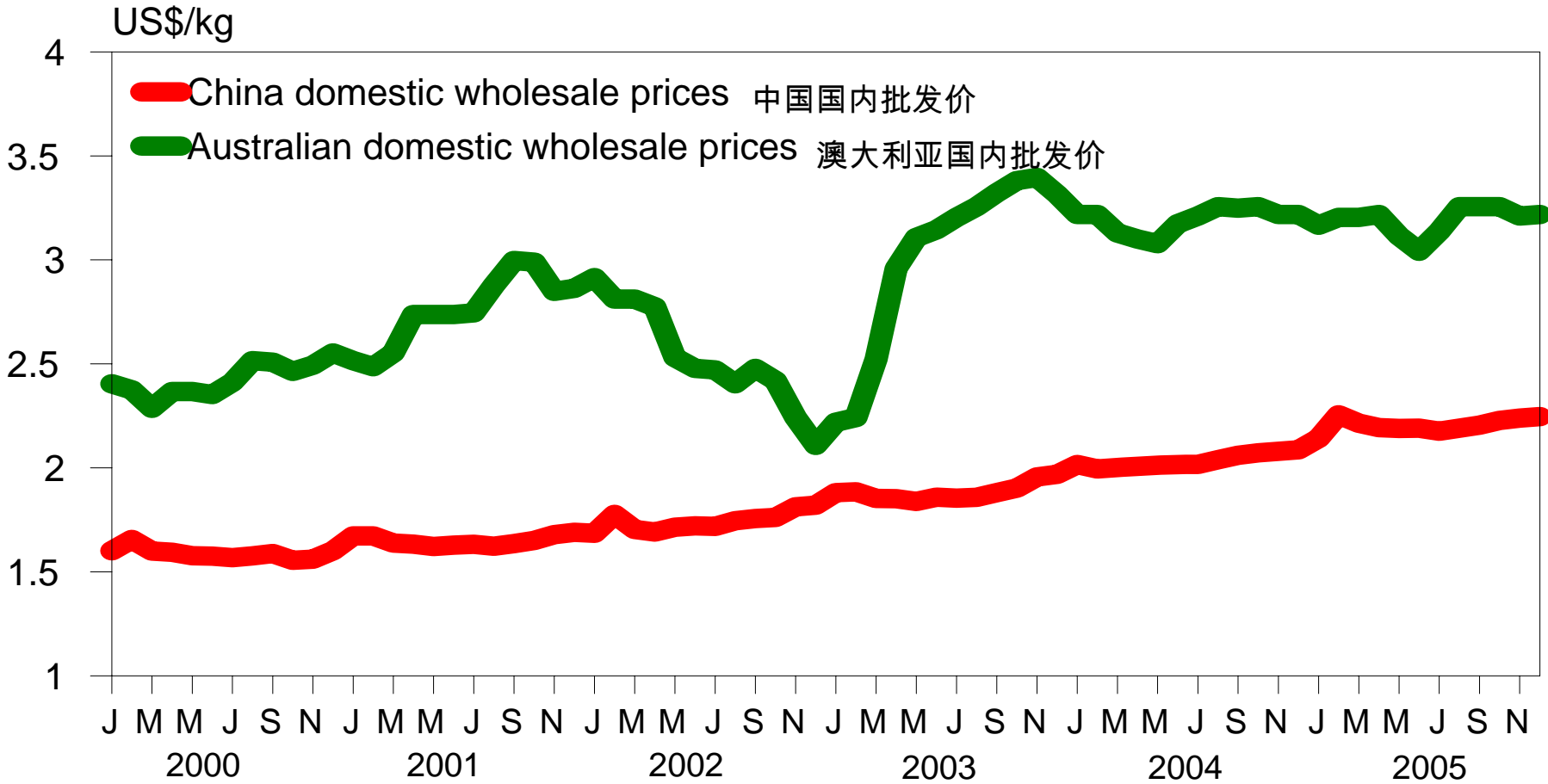


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澳大利亚的牛肉批发价格远远高于中国

Australian beef prices above Chinese prices



Source: SSB & MLA

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澳大利亚牛肉截然不同

Australian beef is clearly differentiated

中国牛肉在农贸市场



Chinese beef: wet market

RMB22kg

澳大利亚牛肉在中国大饭店



Australian beef: China World Hotel

RMB250kg

在超市的价格也明显不同

The price differential is obvious in supermarkets

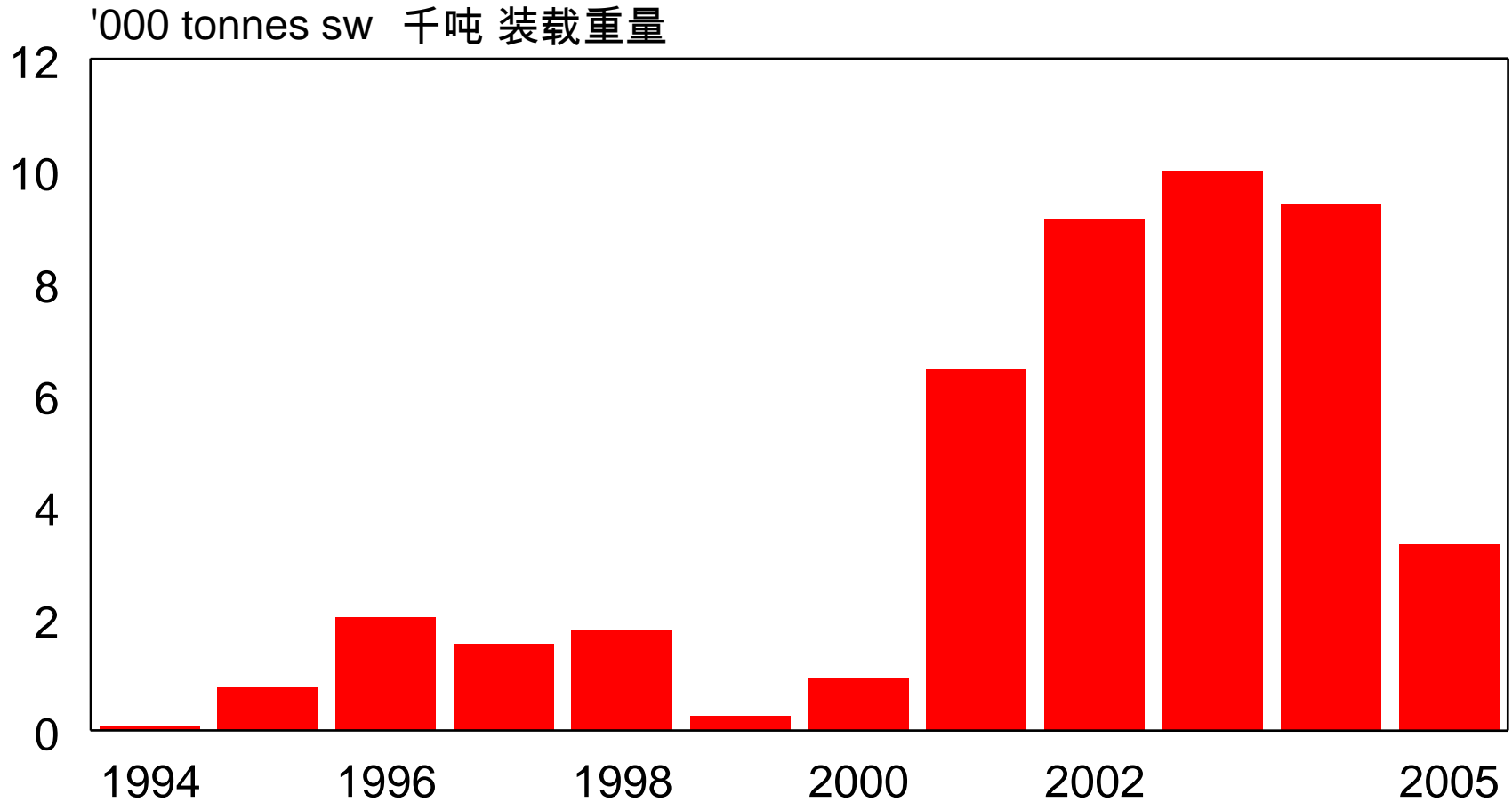


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出口到中国的澳大利亚内脏

Australian offal exports to mainland China



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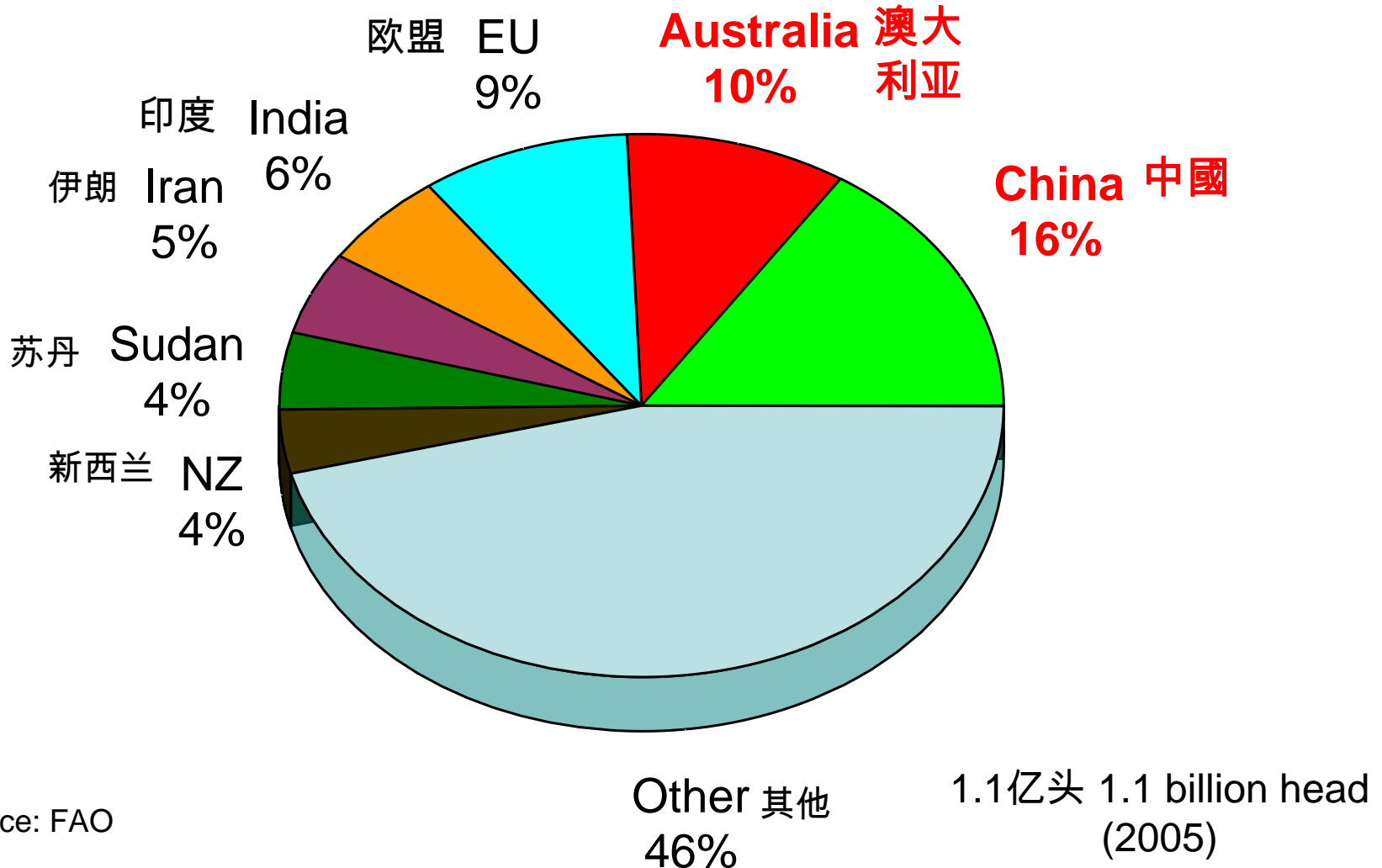
绵羊

To sheep

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世界绵羊数量 World sheep numbers



Source: FAO

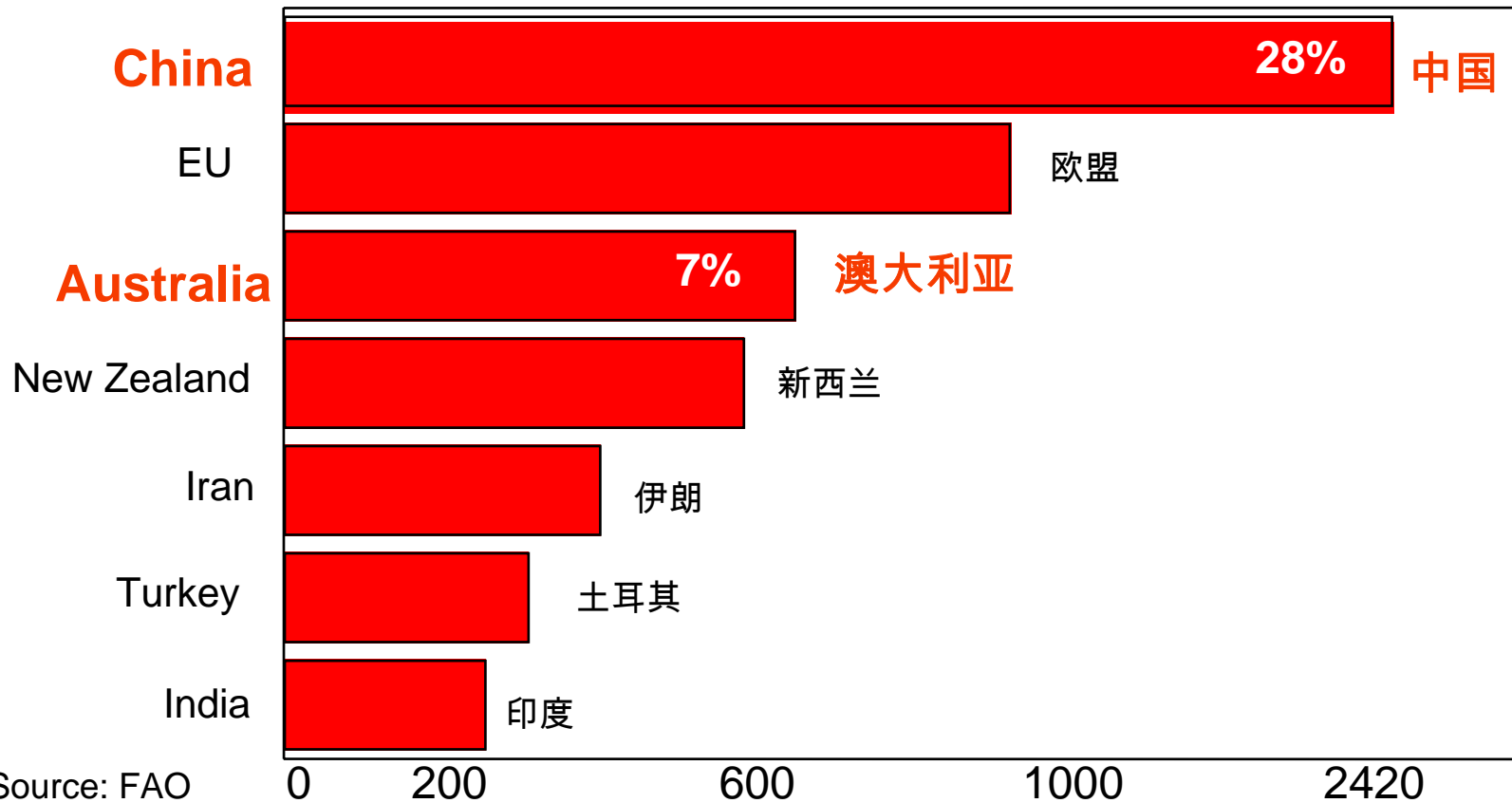
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世界羔羊肉及成羊肉产量

World lamb & mutton production (2005)

'000 tonnes 千吨



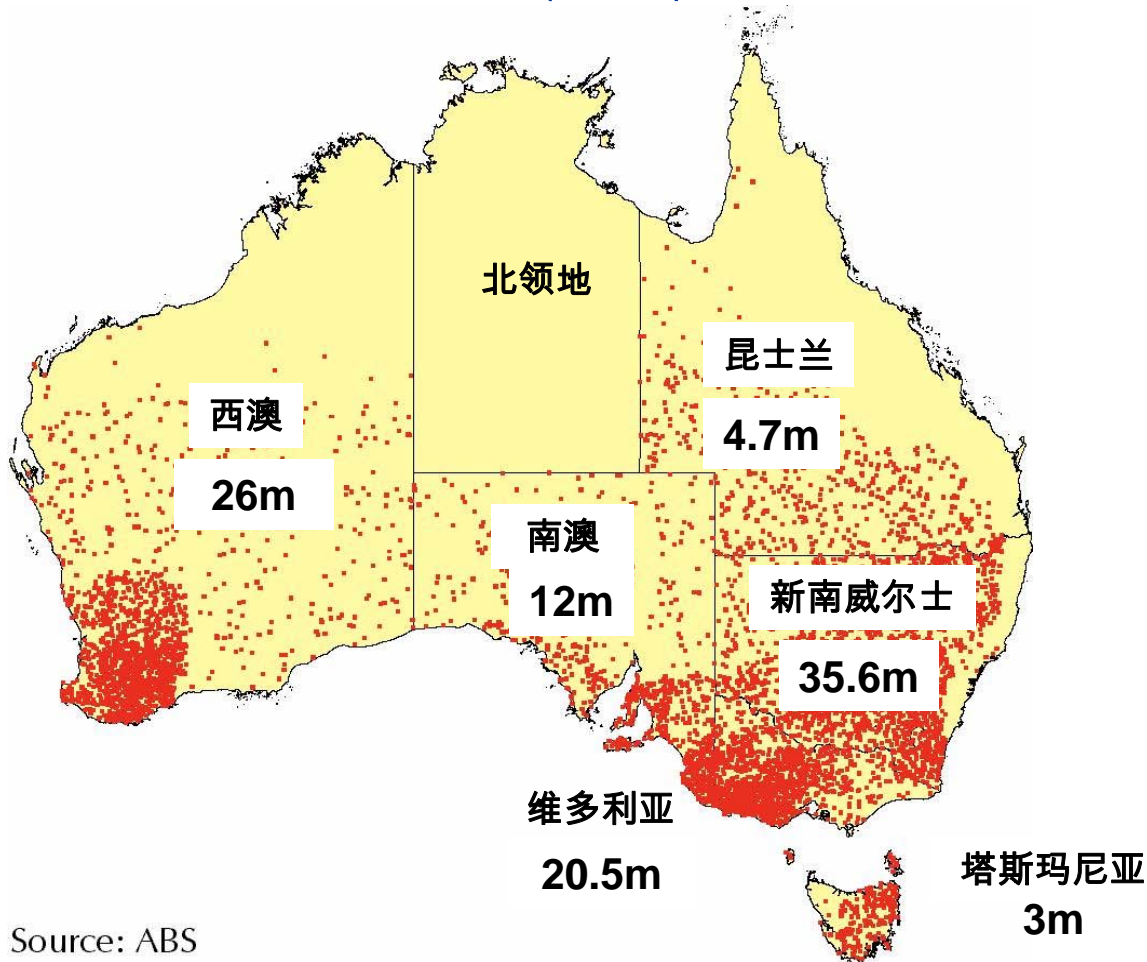
Source: FAO

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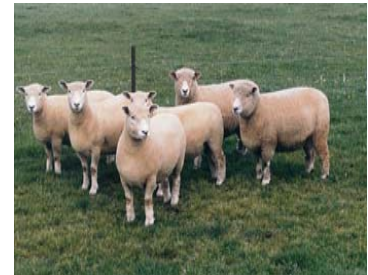


澳大利亚羊只分布 Australian sheep distribution

101 million head (2005) 一亿零一百万头



Source: ABS



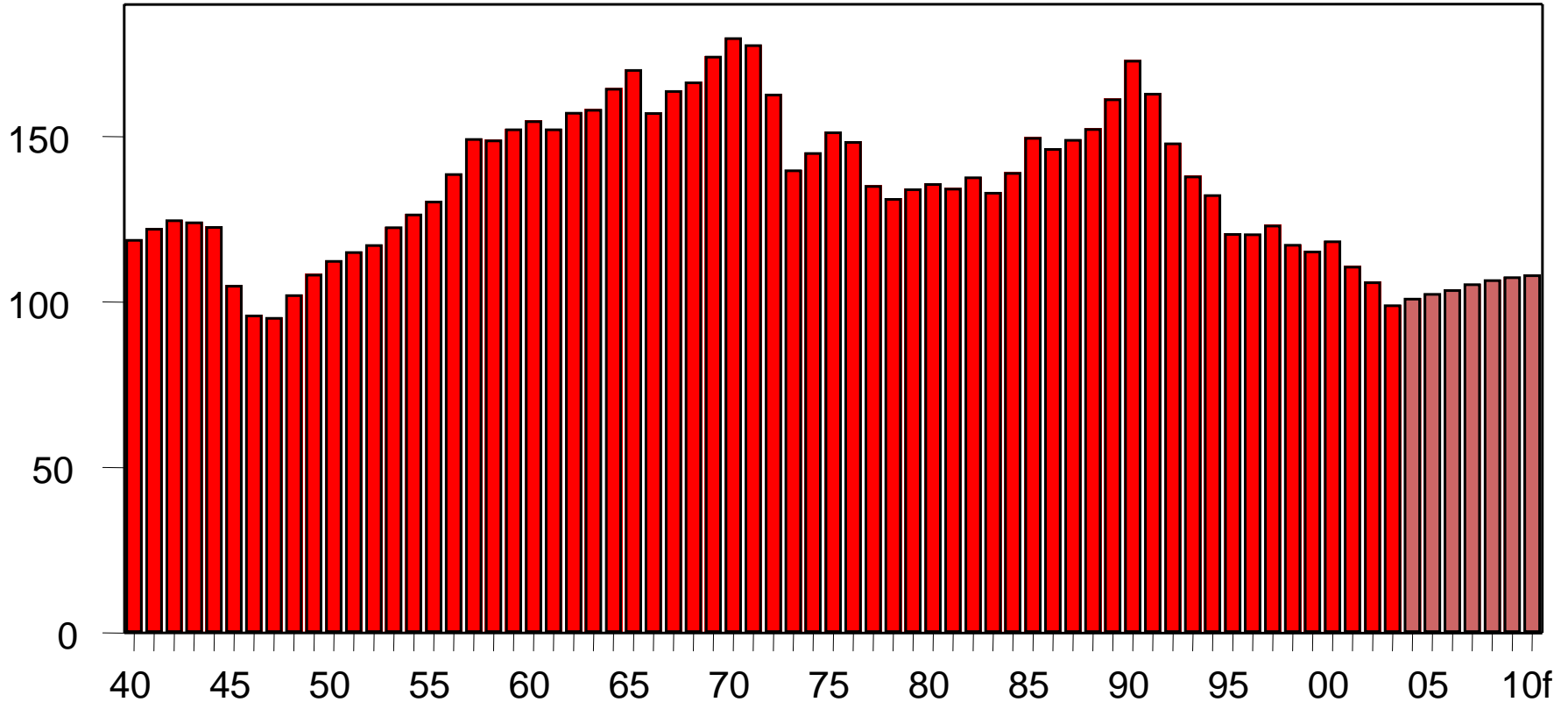
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澳大利亚绵羊数减少

Australian sheep flock growth subdued

million head 百万头



Source: ABS, MLA forecasts

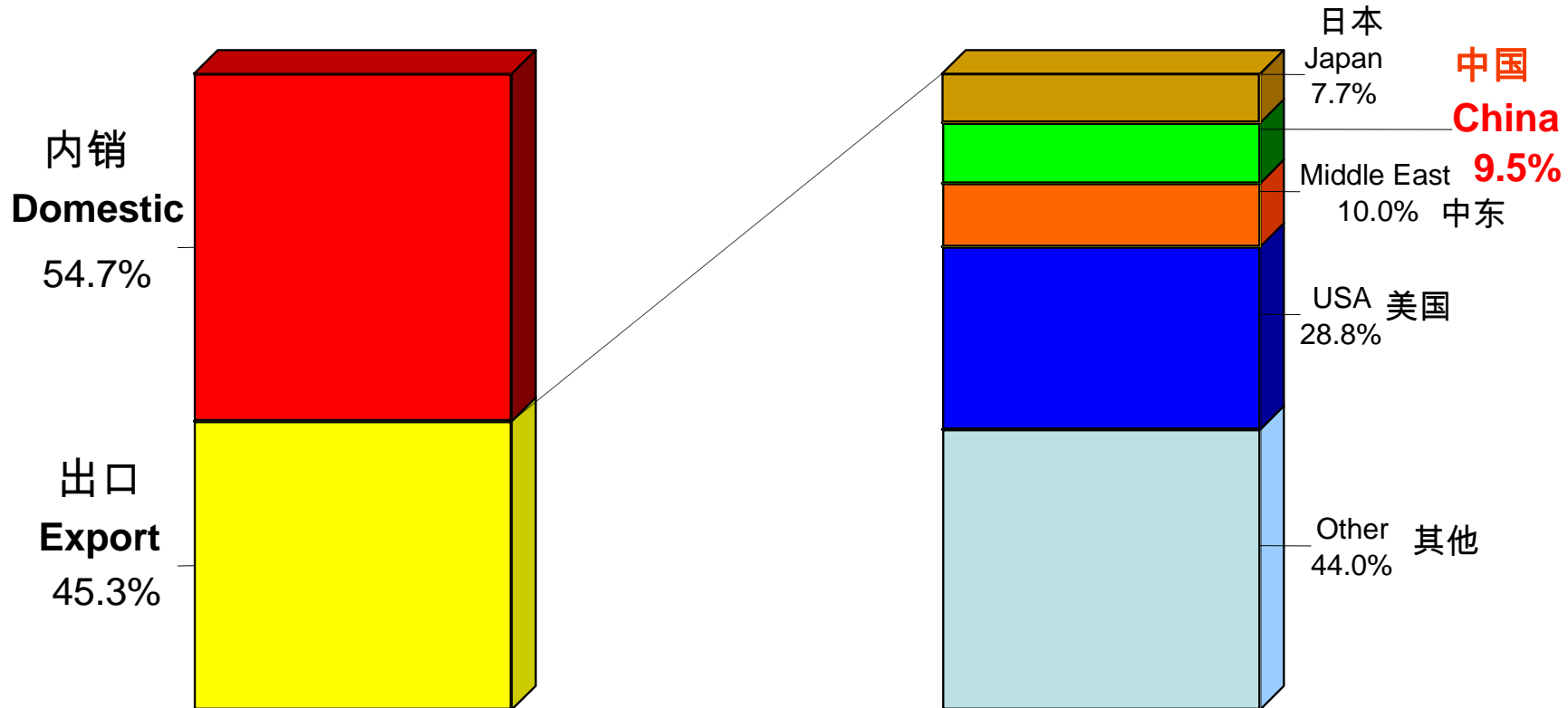
31 March until 1999, 30 June from 2000

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澳大利亚羔羊产量及出口

Australian lamb production & exports



Source: AFFA, ABS, MLA

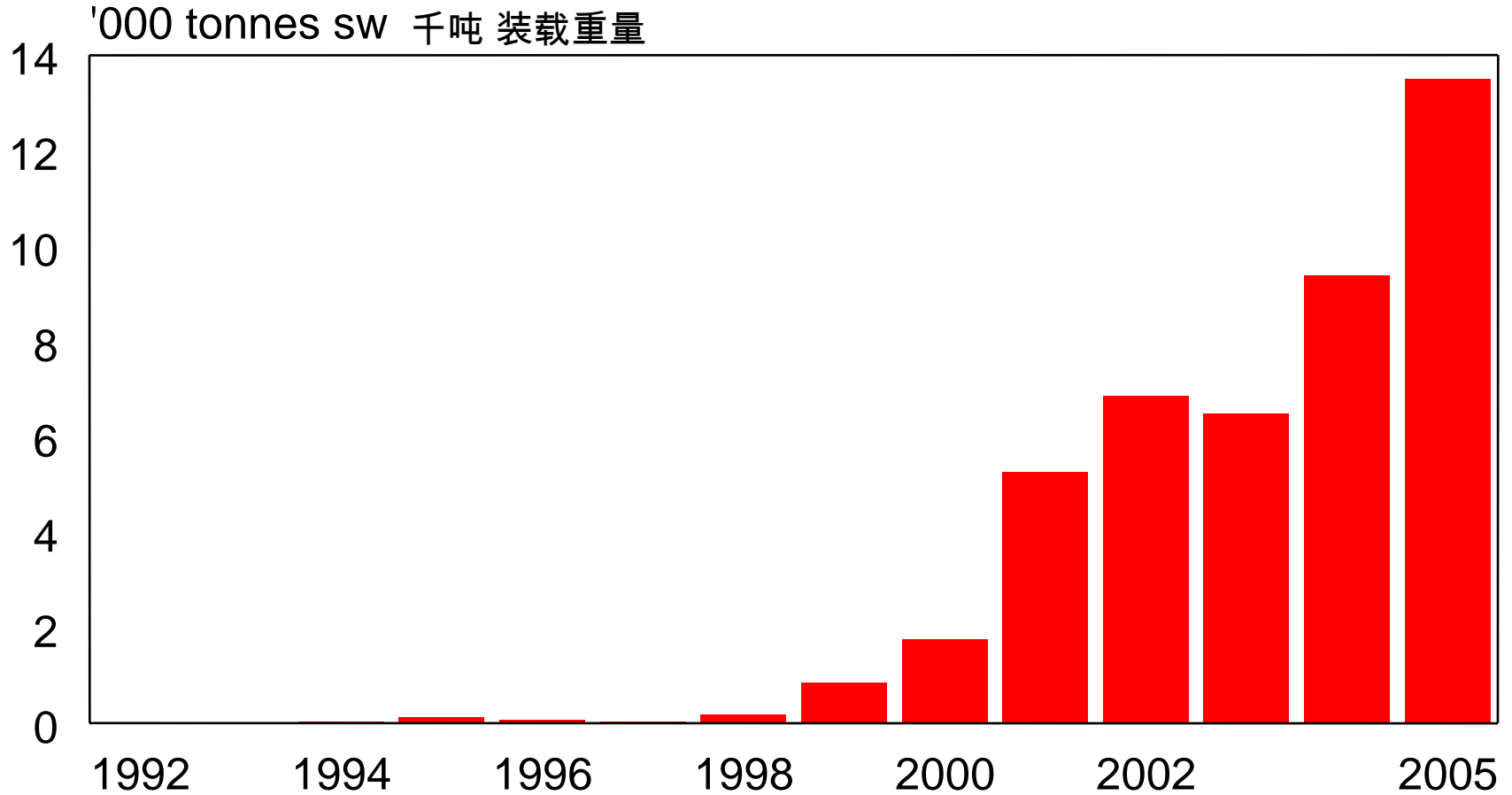
2005 production 产量 = 375,000 tonnes cw 吨 胴体重

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澳洲羔羊肉出口到中国的情况

Australian lamb exports to China

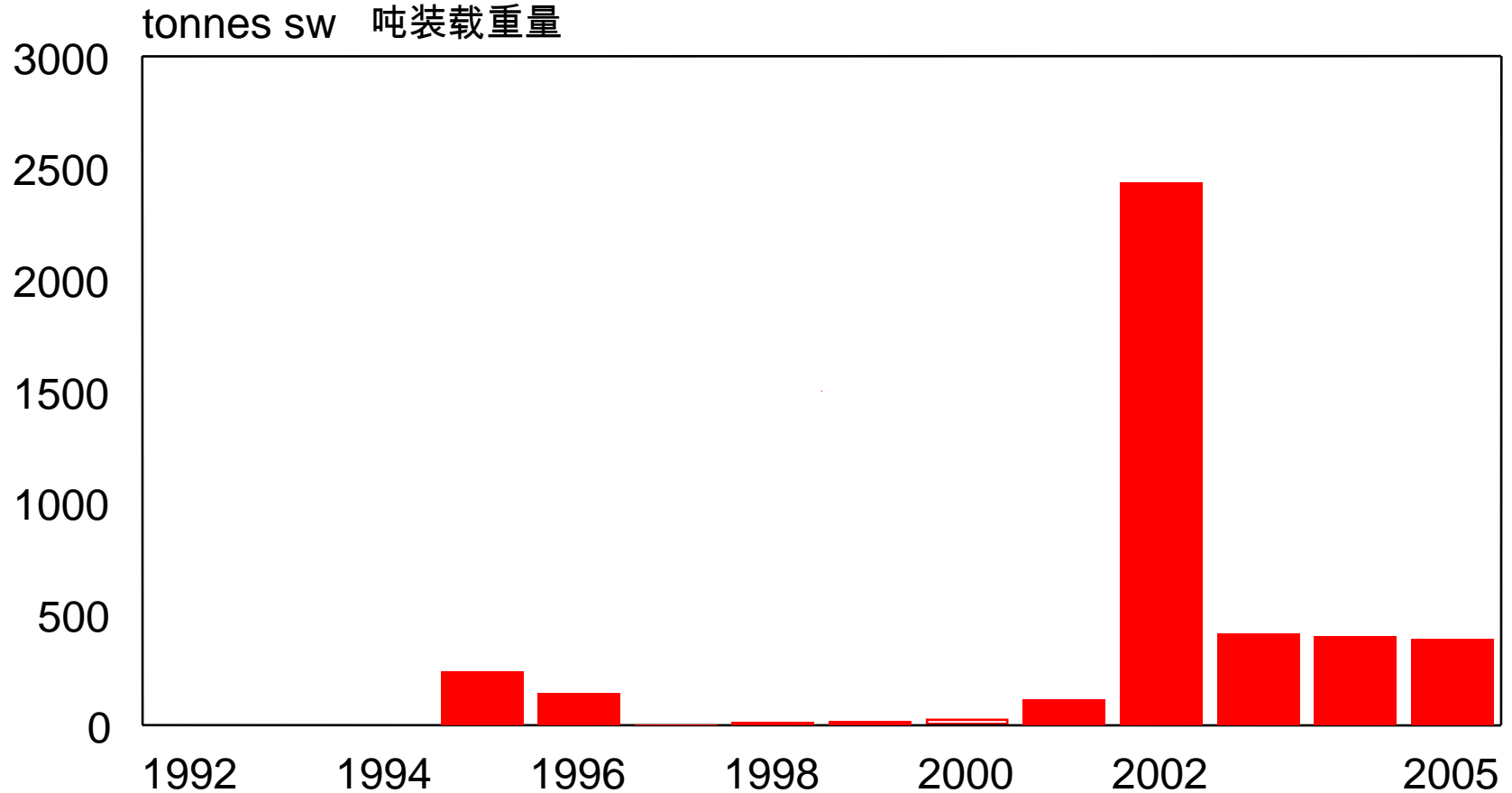


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澳洲成羊肉出口到中国的情况

Australian mutton exports to China

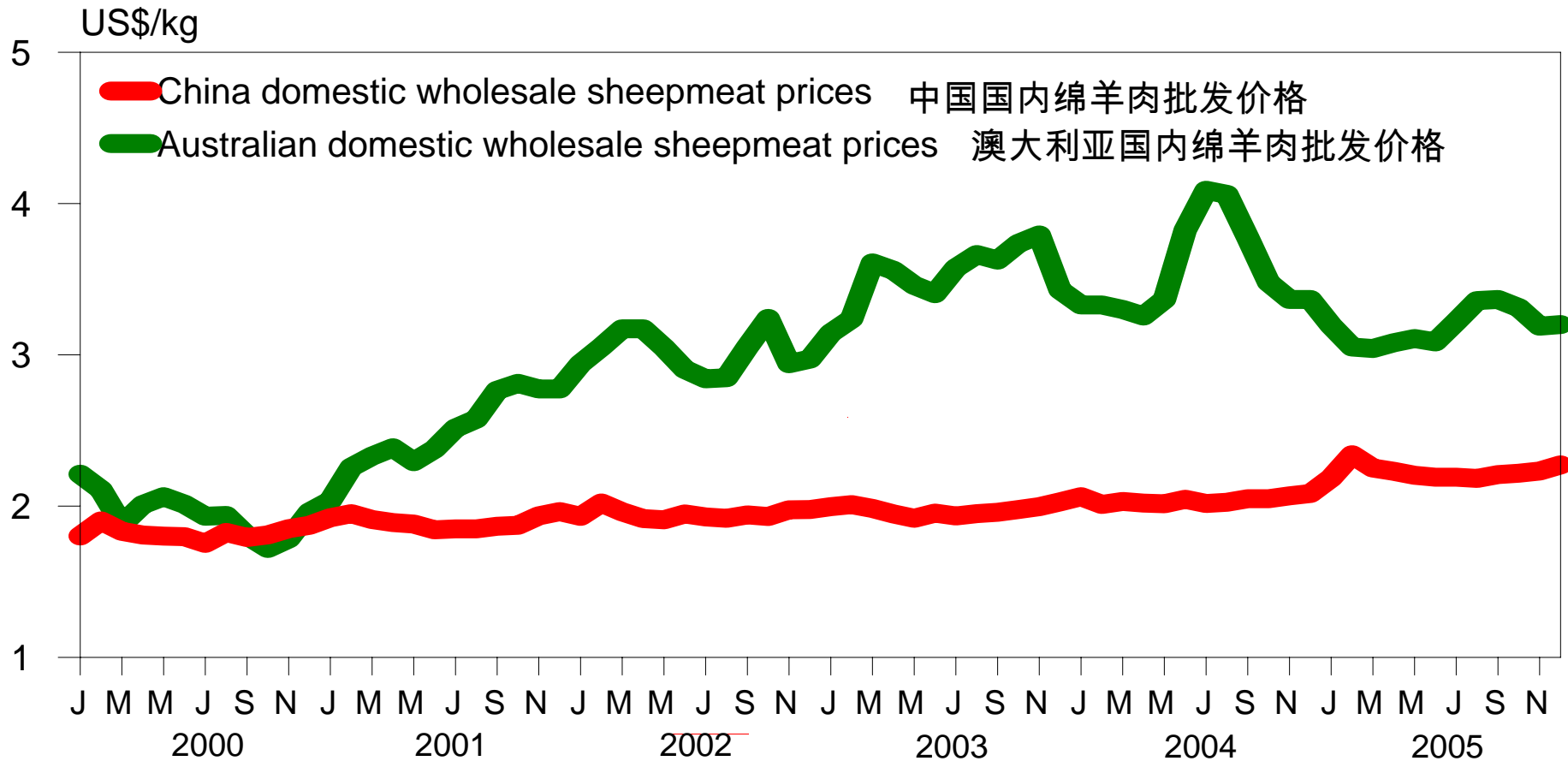


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澳大利亚绵羊肉价格昂贵

High Australian sheepmeat prices



Source: SSB & MLA

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澳大利亚羔羊肉是中国羔羊肉的补充-用于火锅

Australian lamb complements Chinese lamb



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我们的产业有品质保证体系的支持
Quality assurance underpins our
industry

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农场和育肥场的品质保证体系极为重要

On farm & feedlot quality assurance paramount



牛只育肥场的自我管理的质量保证



自动系统



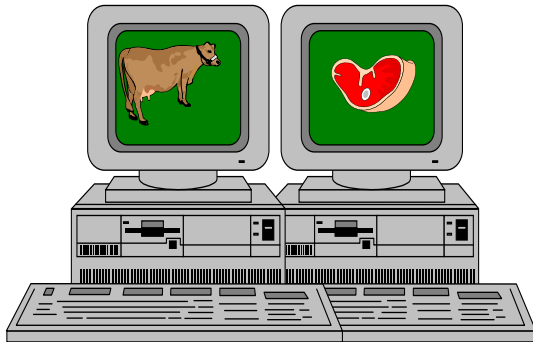
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加工系统可以验证并行之有效

Processing systems are verifiable & best practice

safemeat



屠宰场数据库



胴体资料



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加工产业不断进行技术革新和基础设施建设

The processing industry is investing in new technology & infrastructure



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联手共同促进红肉的消费

A partnership to grow red meat consumption

- 澳大利亚红肉产业非常热心与中方同行合作促进牛羊肉的消费
Australian industry is keen to work with Chinese counterparts to grow beef and sheepmeat consumption
- 我们的竞争对手不是彼此双方-而是猪肉和鸡肉
Our competitors are not each other – but pork and poultry!
- 我们可以分享研究成果、促销方案以及交换品质与追溯体系的信息
Share research, promotion ideas and exchange information on quality systems and traceability
- 只有互惠双赢才可能成为密切的合作伙伴
Closer partnership can only be mutually beneficial

小结 In summary

- 与澳大利亚相比，中国能过生产足够多的红肉
China has a substantially larger red meat production base compared to Australia
- 澳大利亚红肉在中国市场只占很小的比重-使用特定部位
Australia's market presence in China will be 'niche' – using speciality cuts
- 澳大利亚牛羊肉产业为保证我们的产品卫生并安全作了非常大的投入
Australian beef and sheepmeat industries have invested heavily in ensuring products are clean and safe
- 我们的产业自然而然地视中国为伙伴
China is a natural partner

谢谢您

Thank you

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