

The Australian Red Meat & Livestock Industry: An Overview

澳洲红肉及畜牧产业概述

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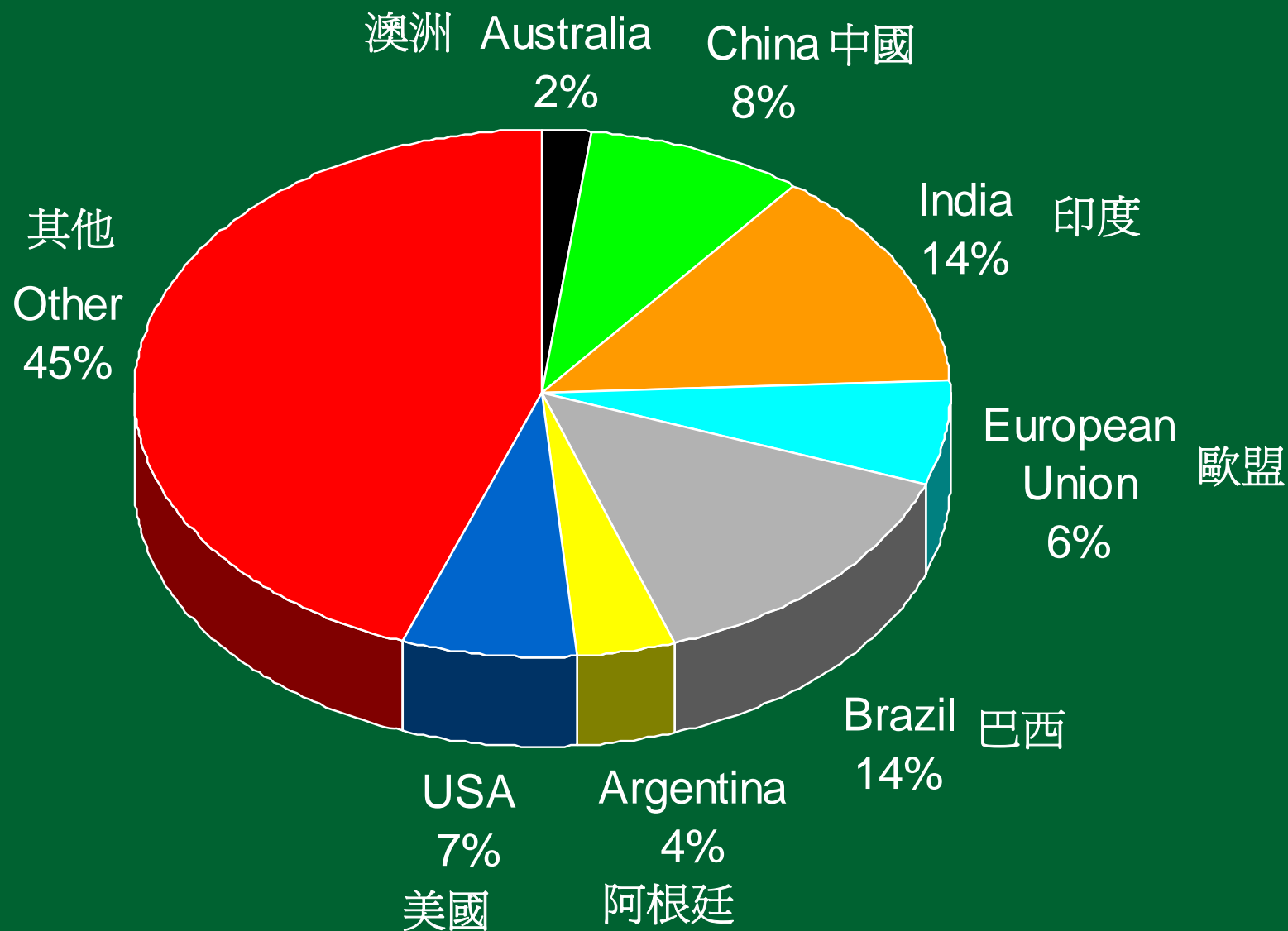
Economic, Planning & Market Services 经济计划及市场营销

Meat & Livestock Australia 澳洲肉类及畜牧业协会

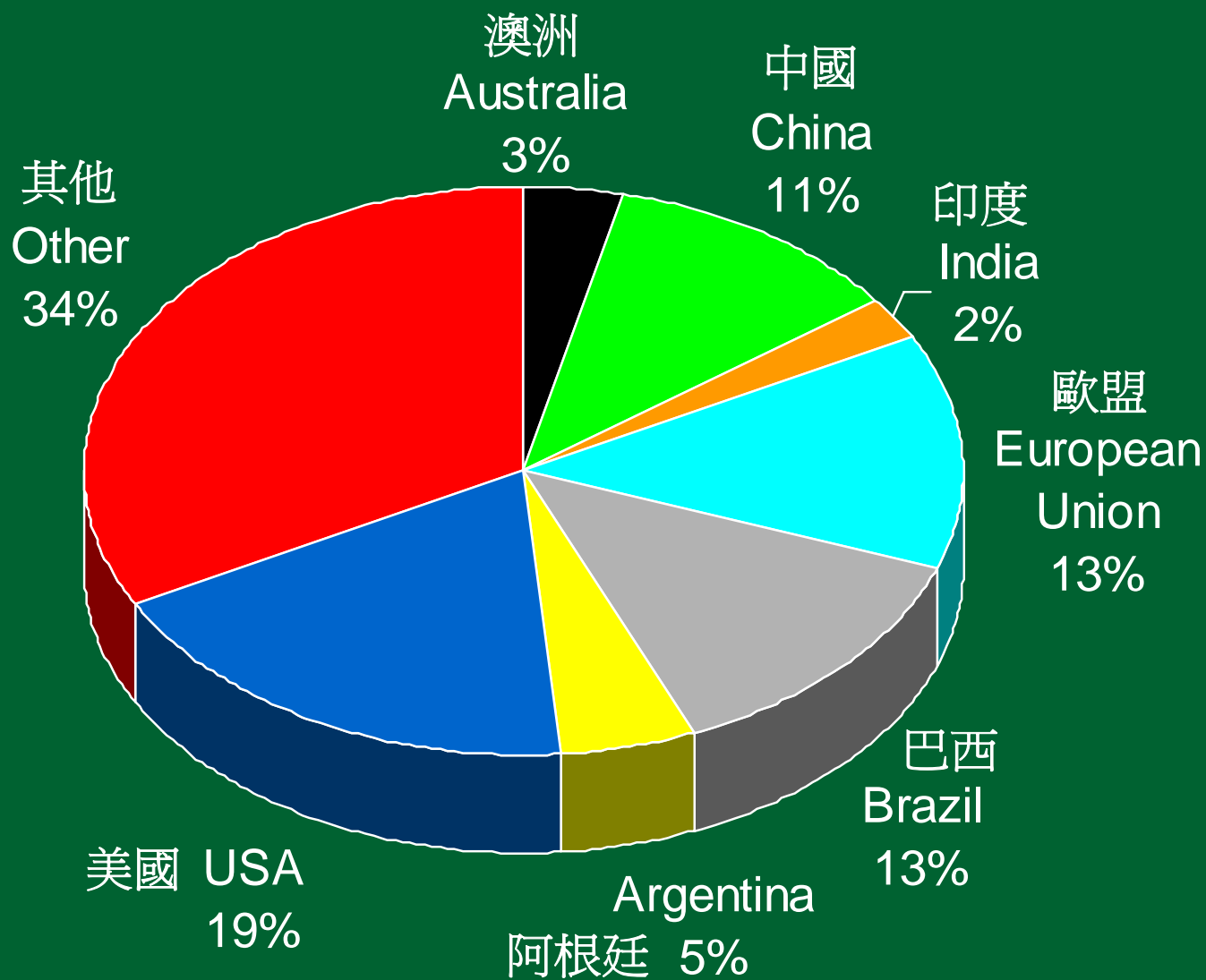
Comparative statistics 比较上的统计值

	Australia	China
Area (sq kms millions) 面积 (平方公里)	7.687	9.634
Population (millions) 人口 (百万)	20	1,314
Cattle numbers (millions) 牛只数目 (百万)	28	115
Sheep numbers (millions) 羊只数目 (百万)	103	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%
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
Bovine consumption (kgs) 牛肉消耗量	35.4	4.9

World cattle numbers 世界牛只数量比较

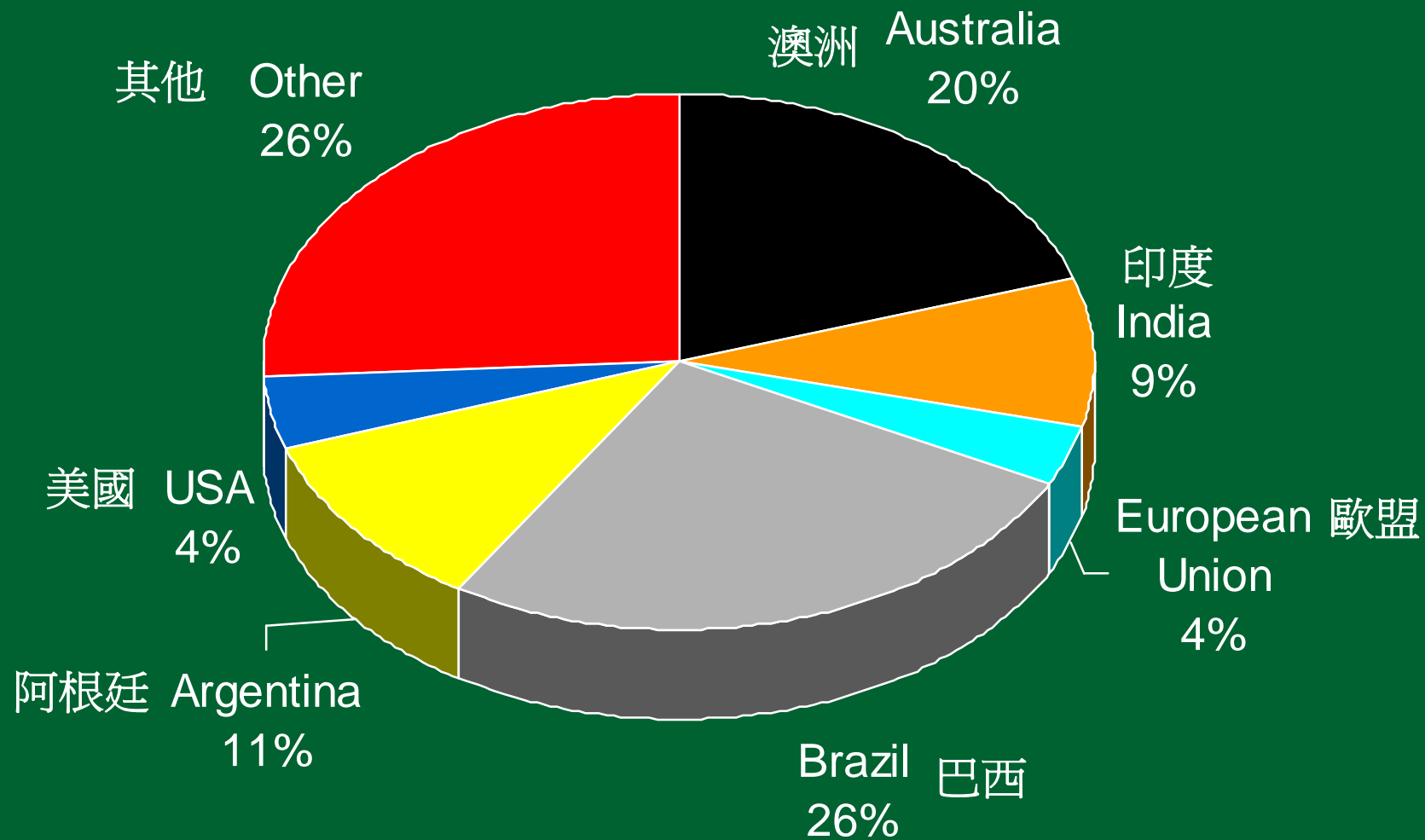


World beef production 世界牛肉产量



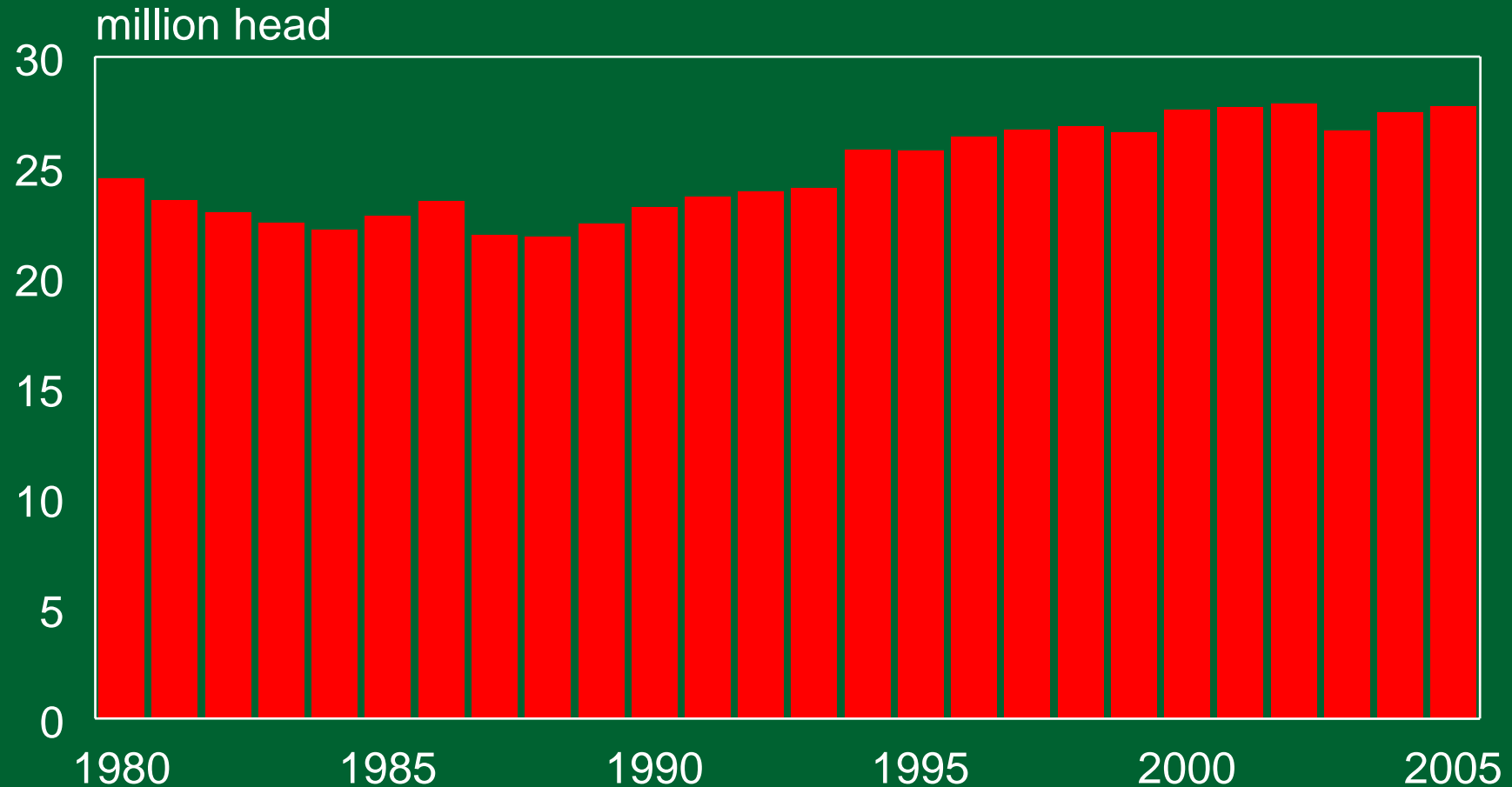
Australia in a world perspective

- beef exports 澳洲由世界來看 - 牛肉出口量



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

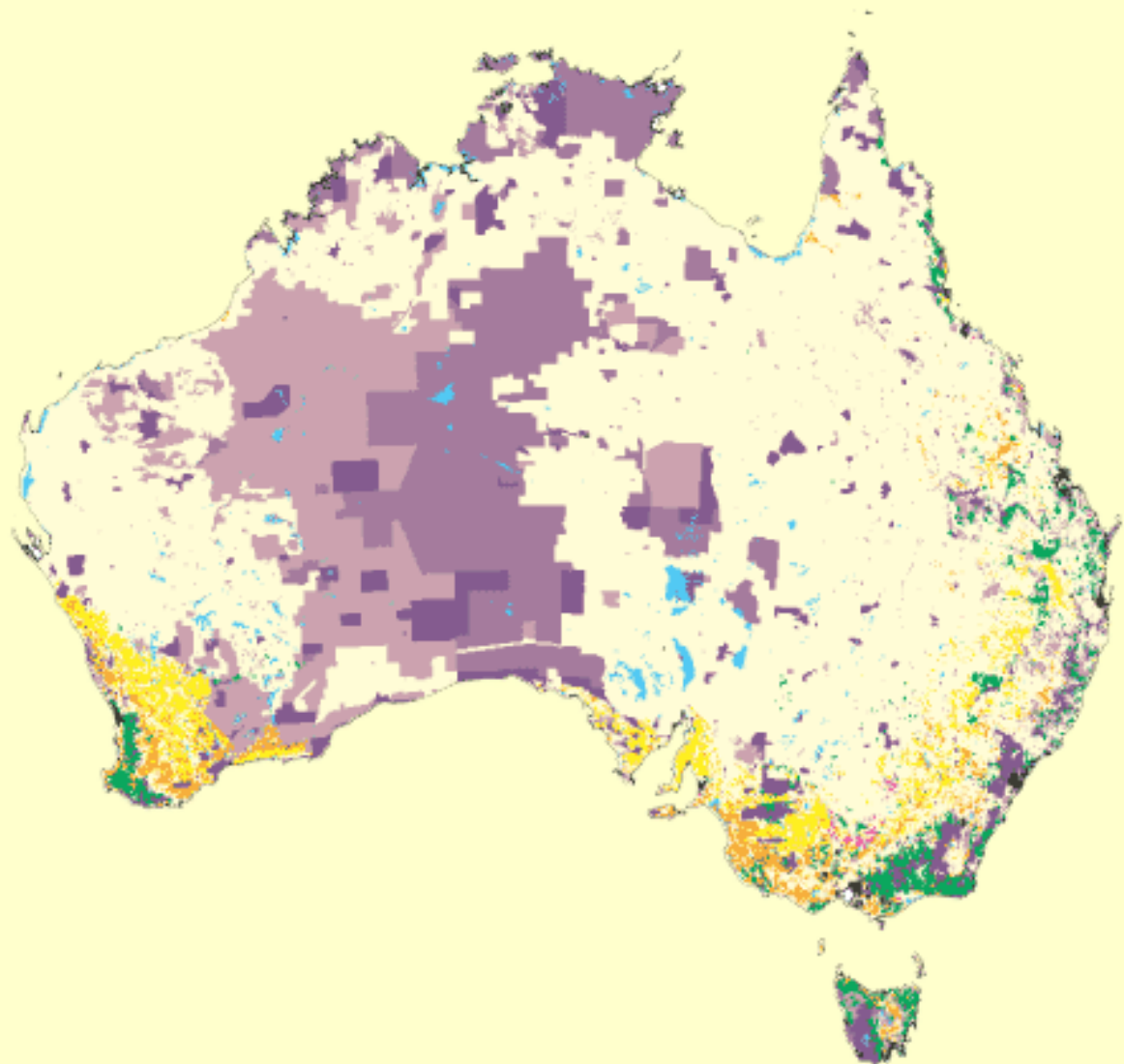
澳洲牛只近25年来一直稳定在比较合理的数目上



Although Australia is large, much of the continent is reserved for conservation or minimal use 澳洲尽管很大，但实际使用的面积并不大

Figure 1.2 National land use map.

Land use



Source:

National Land and Water Resources Audit 2001.
Data used are assumed to be correct as received
from suppliers.
©Commonwealth of Australia 2001

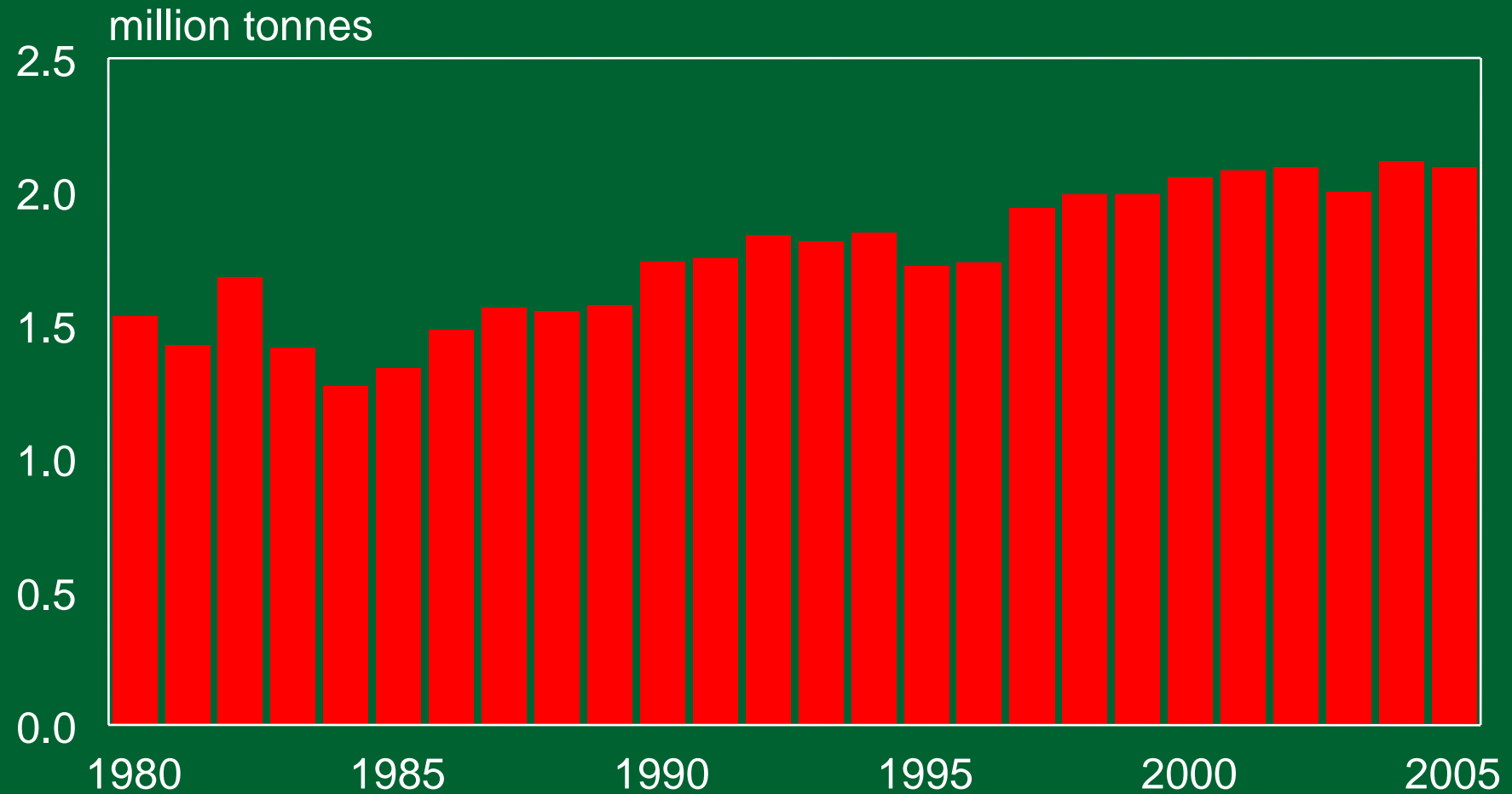
The livestock grazing areas are typically arid & support limited numbers of cattle & sheep

放牧牲畜的地区是典型的贫瘠地区，只能供养为数有限的牛羊



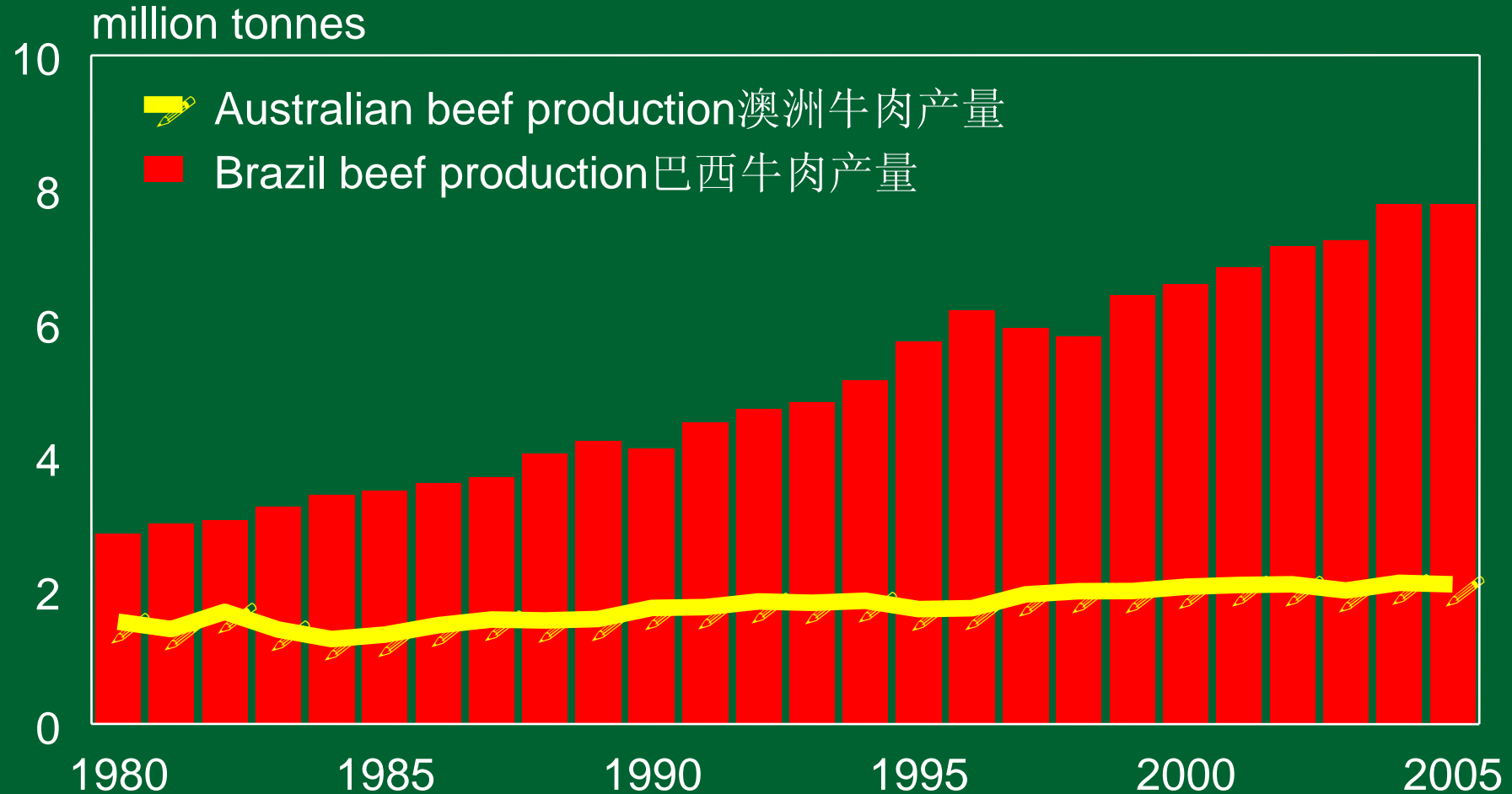
Modest growth in Australian beef production

澳洲牛肉产量增长适度



But the growth has been small compared to growth in South American production

与南美产量增长相比，澳洲增长幅度很小

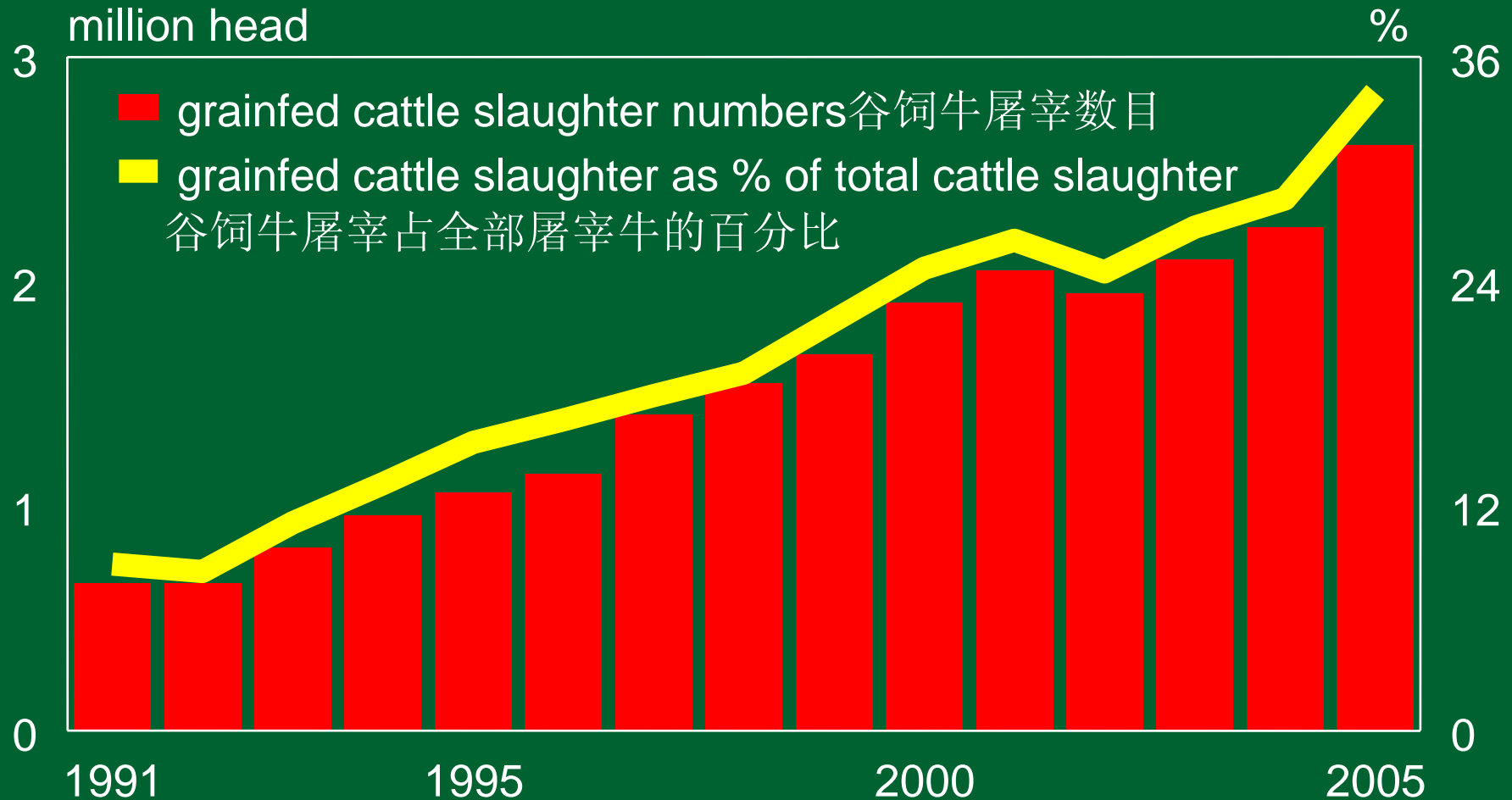


About 2/3s of Australian cattle are raised exclusively on grass pastures
大约三分之二的澳洲牛只是草饲的



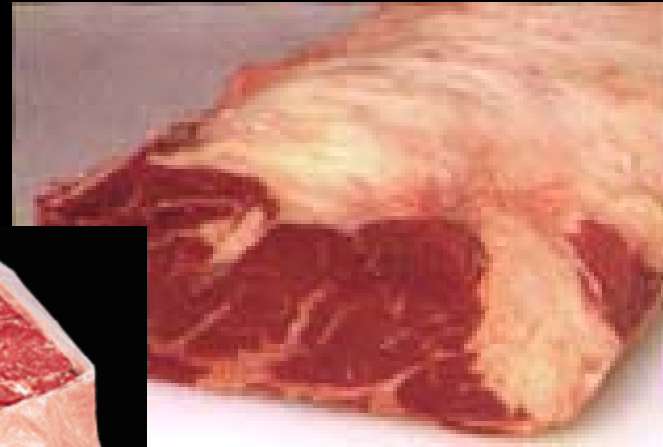
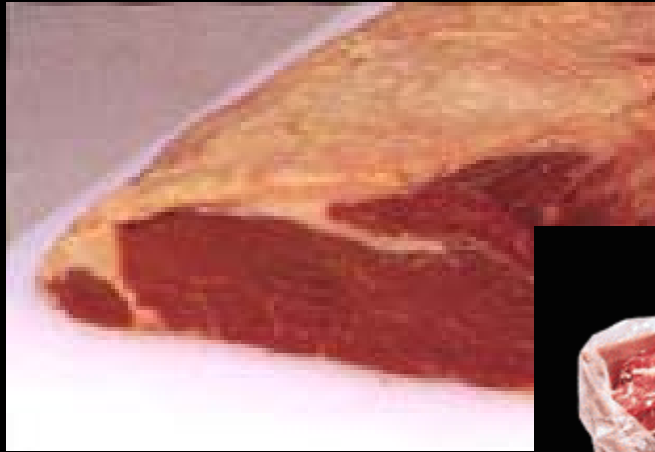
But 1/3 are now grainfed - & this has been increasing

三分之一是谷饲，且这个数目一直增长



Diversity in meat production

牛肉产品多样化



Utilisation of Australian beef

澳洲牛肉进出口分配



Exports
出口

Domestic
内销

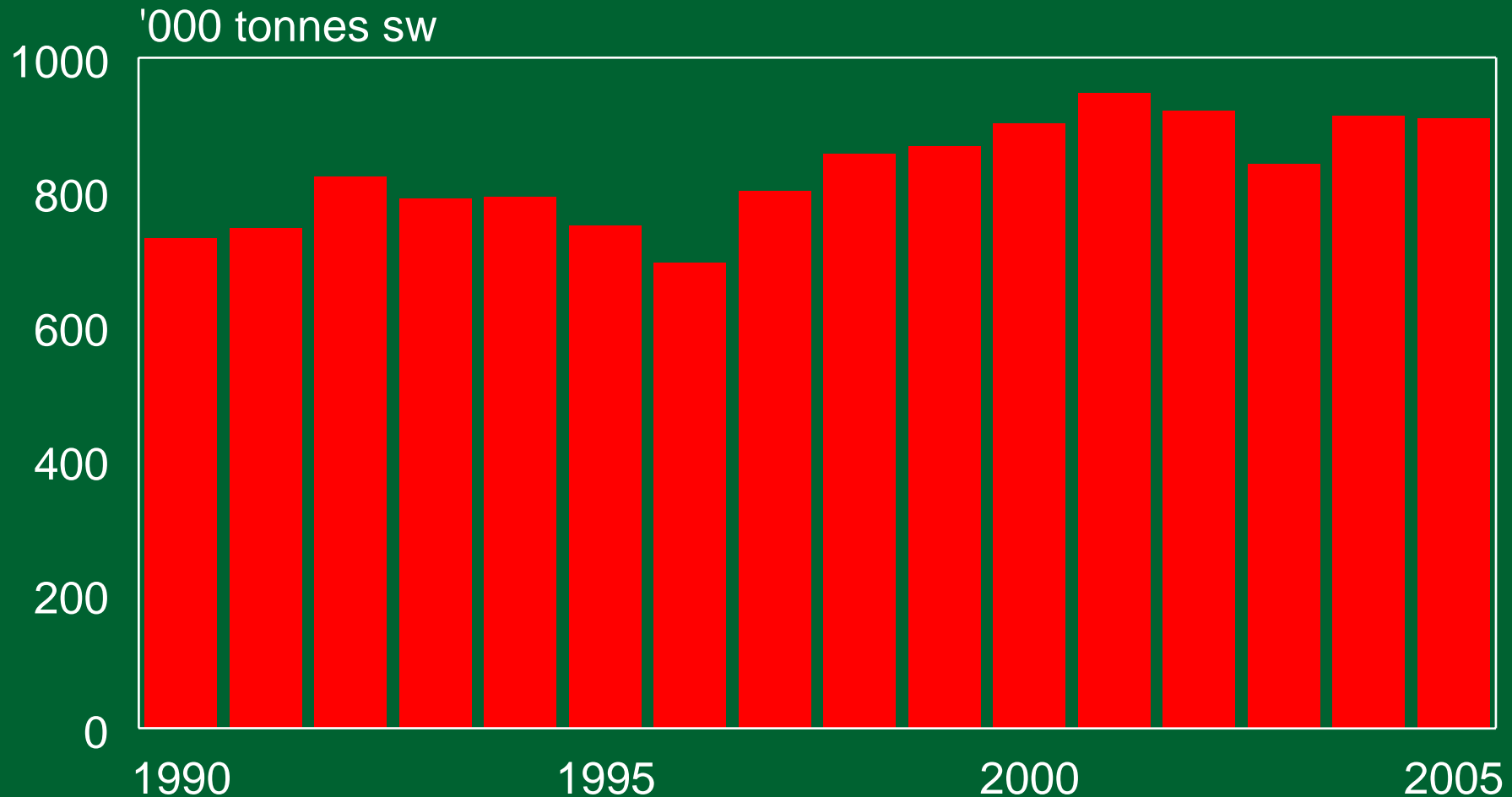
909,000 tonnes sw

65%

35%

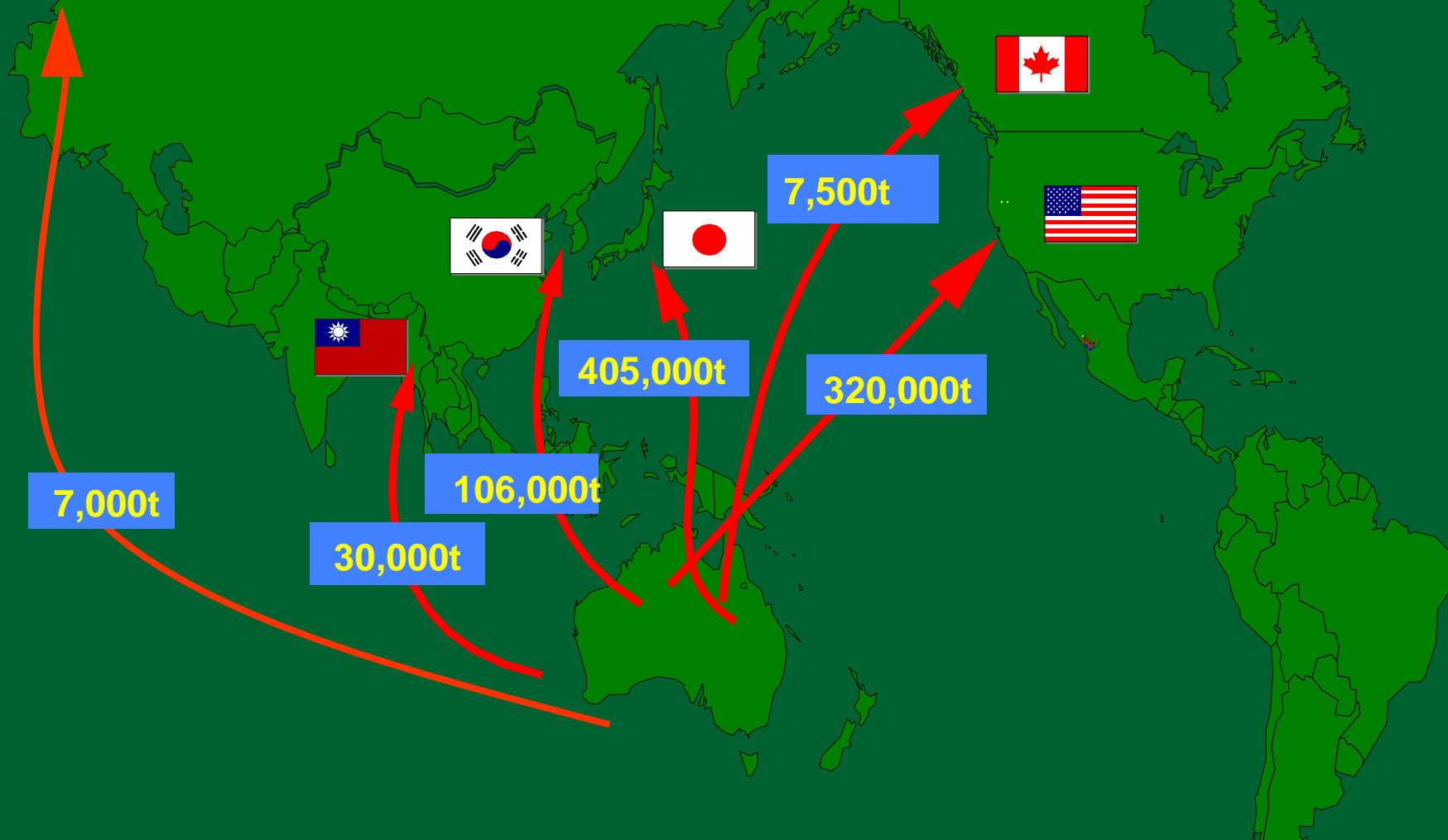
35 kgs / head

There has been some growth in Australian beef exports 澳洲牛肉出口有所增长



Australia's beef exports 2005

2005 年澳洲牛肉的出口目的地



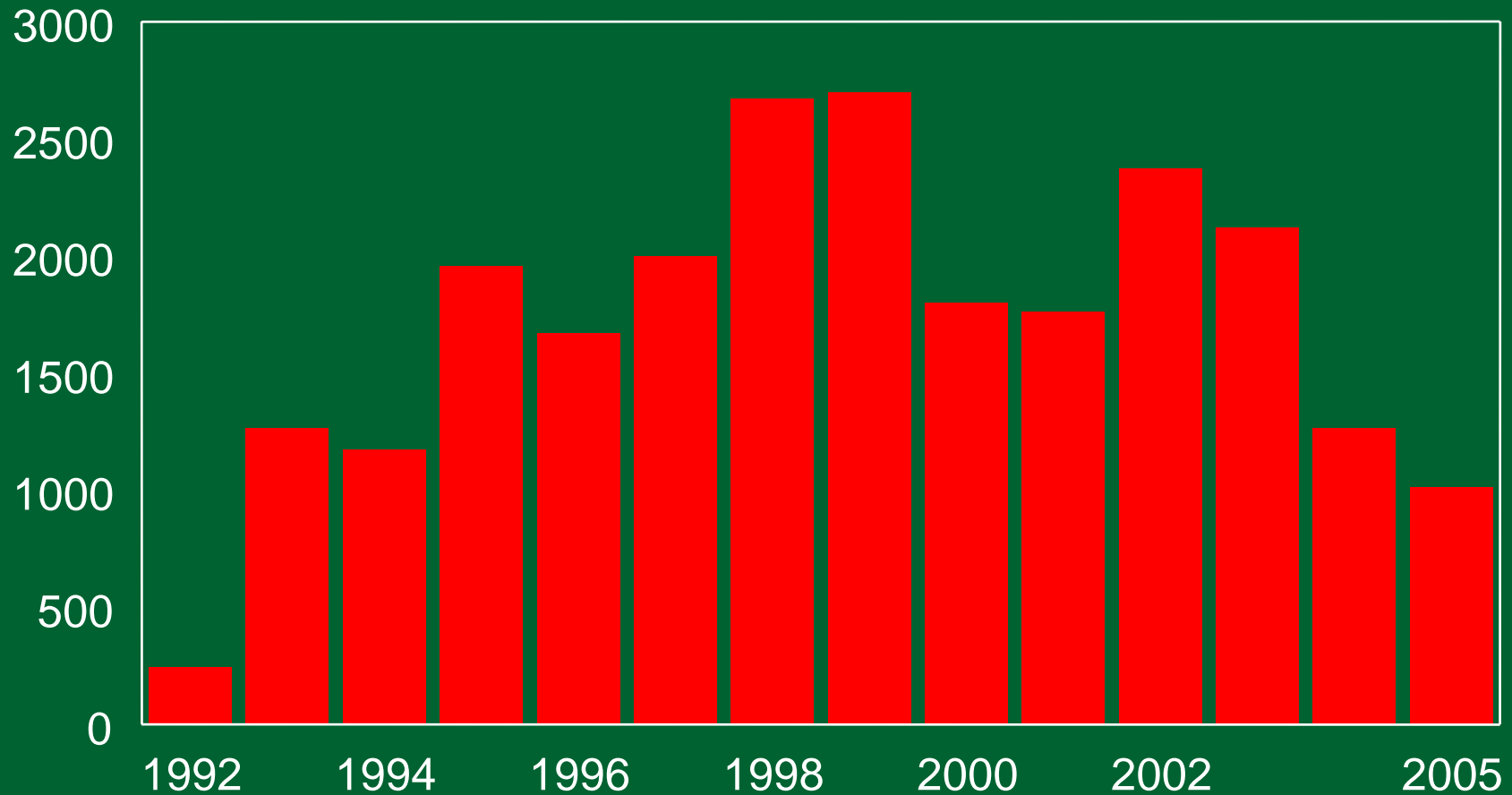
Australia - free from FMD & BSE

澳洲 – 无口蹄疫及疯牛病

- Australia is free from FMD
澳洲无口蹄疫
 - freedom maintained through strict quarantine procedures
通过严格的检疫程序避免疫情发生
- Australia is free from BSE & scrapie
澳洲无疯牛病和羊搔痒症
 - Australia in the highest category of BSE freedom
澳洲位于无疯牛病的最高等级
 - strict feeding regimes are in place
执行严格的饲喂制度

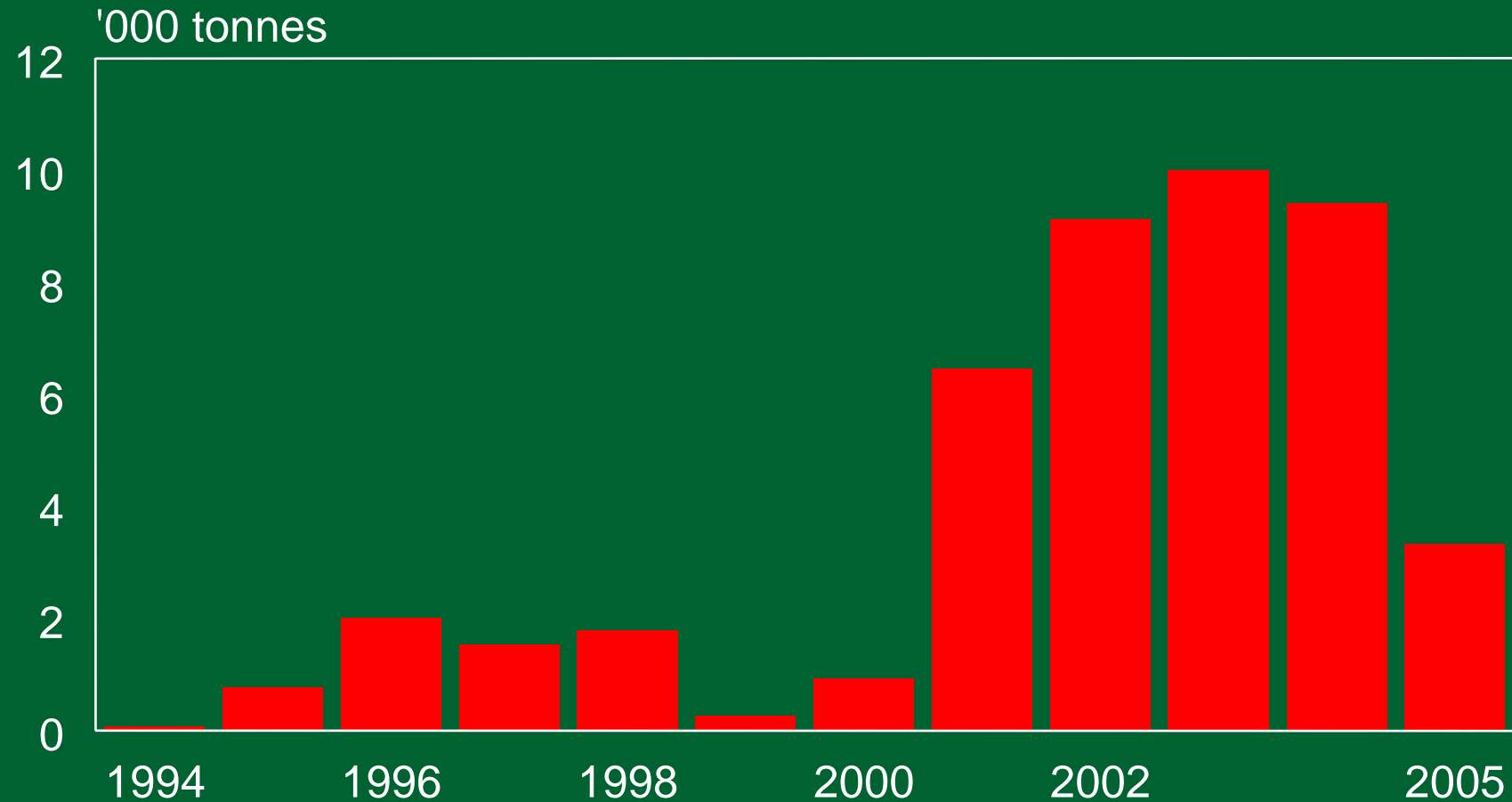
Australian beef exports to mainland China

澳洲牛肉出口到中国的数目



Australian offal exports to mainland China

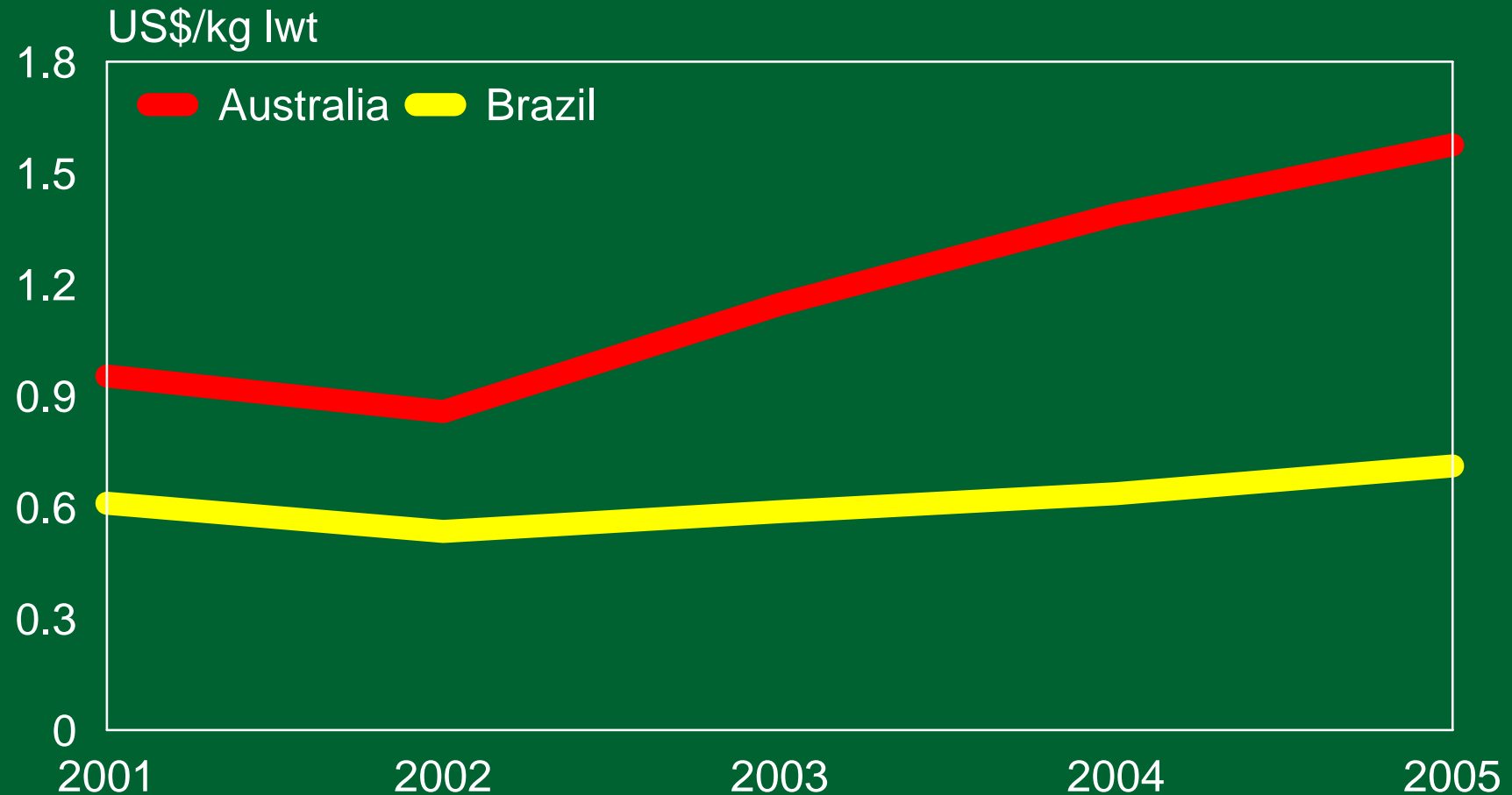
澳洲内脏出口到中国的数目



The price of Australian beef is high –
sales will be confined to niche areas
in China

澳洲牛肉价格昂贵-在中国能销售的范
围极小

Our prices are much higher than those in Brazil 澳洲的价格比巴西的价格高很多



And our beef prices are higher than local
beef prices

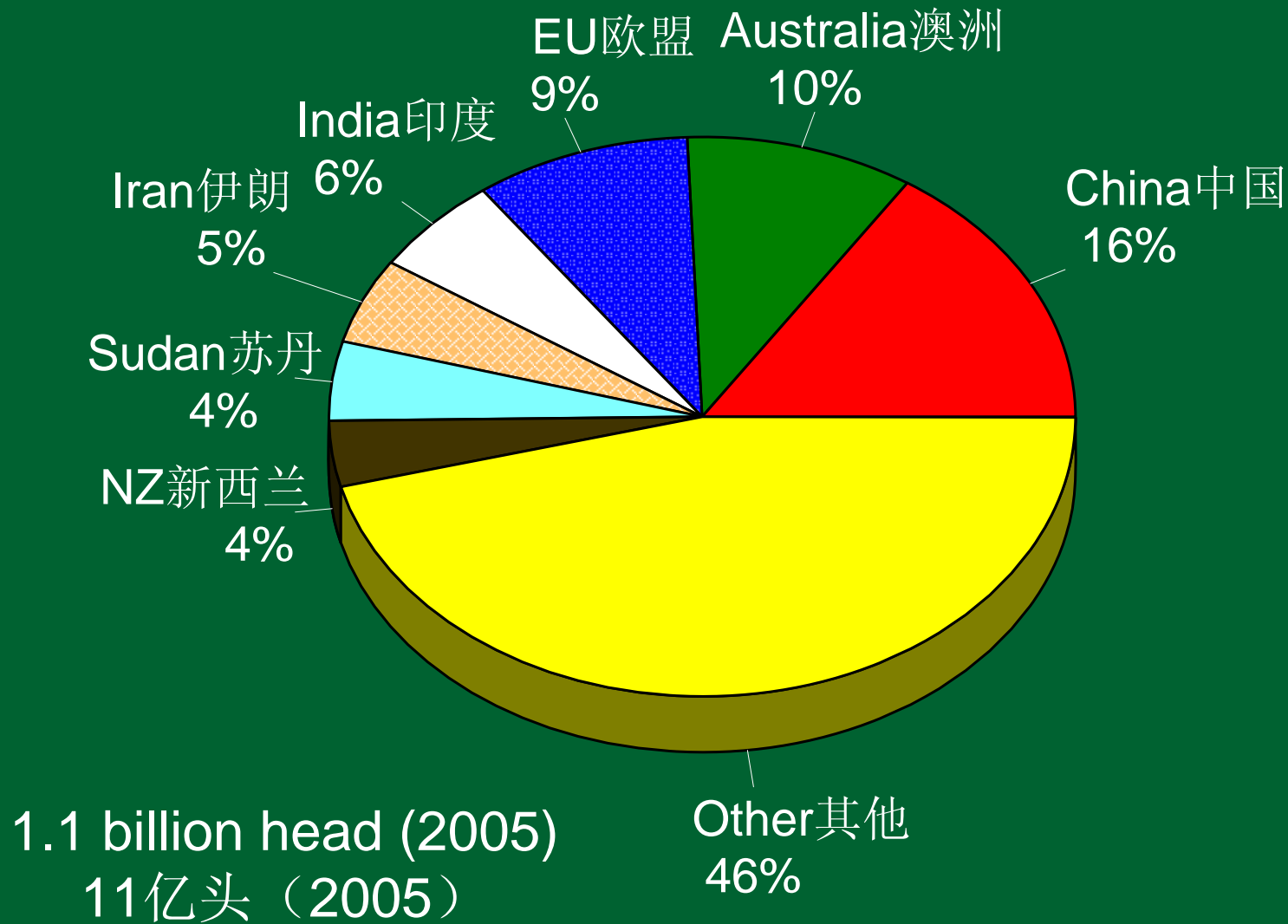
澳洲牛肉价格远贵于贵国国产牛肉价格



To sheep

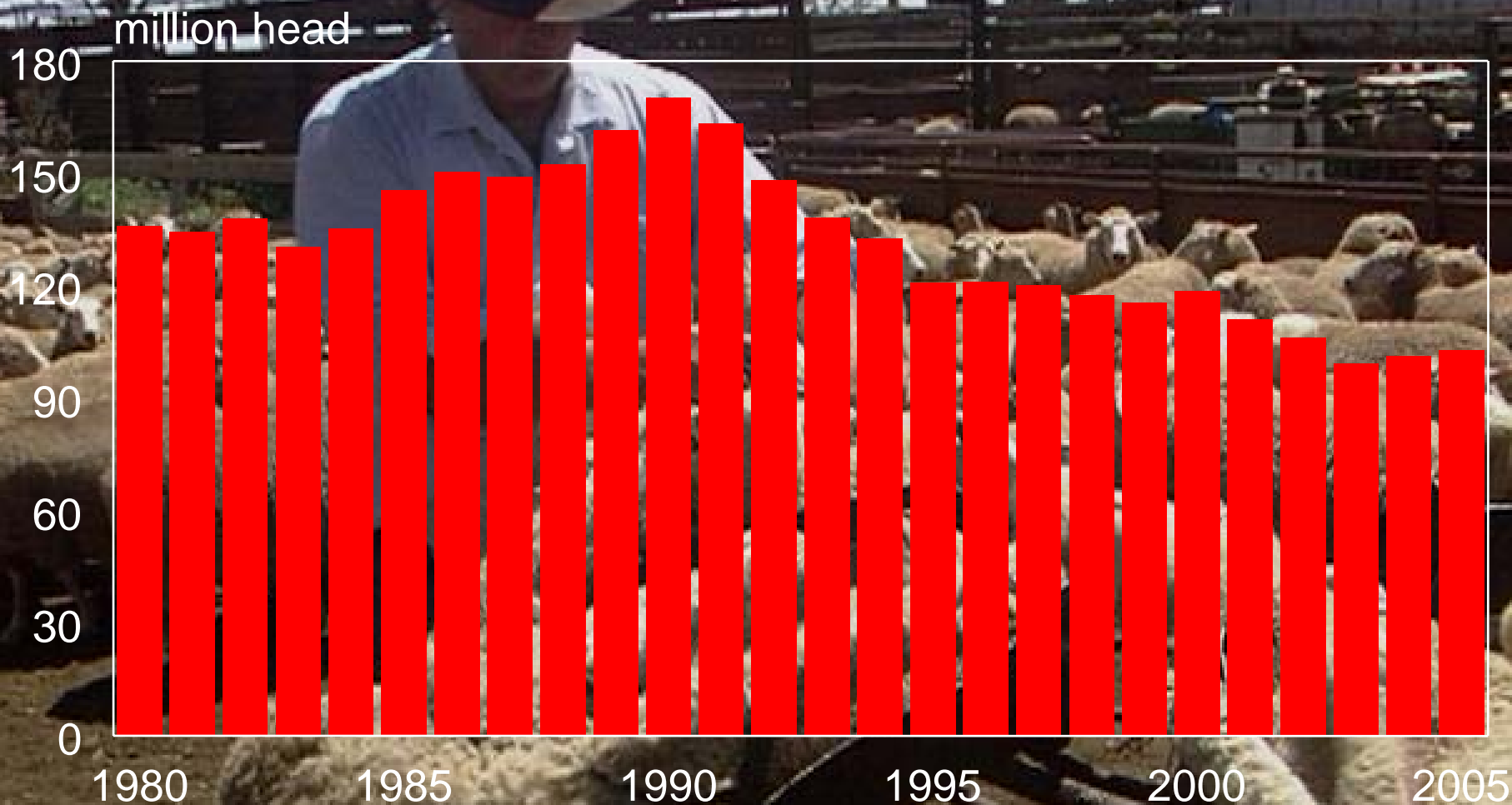
绵羊

World sheep numbers 世界绵羊数量



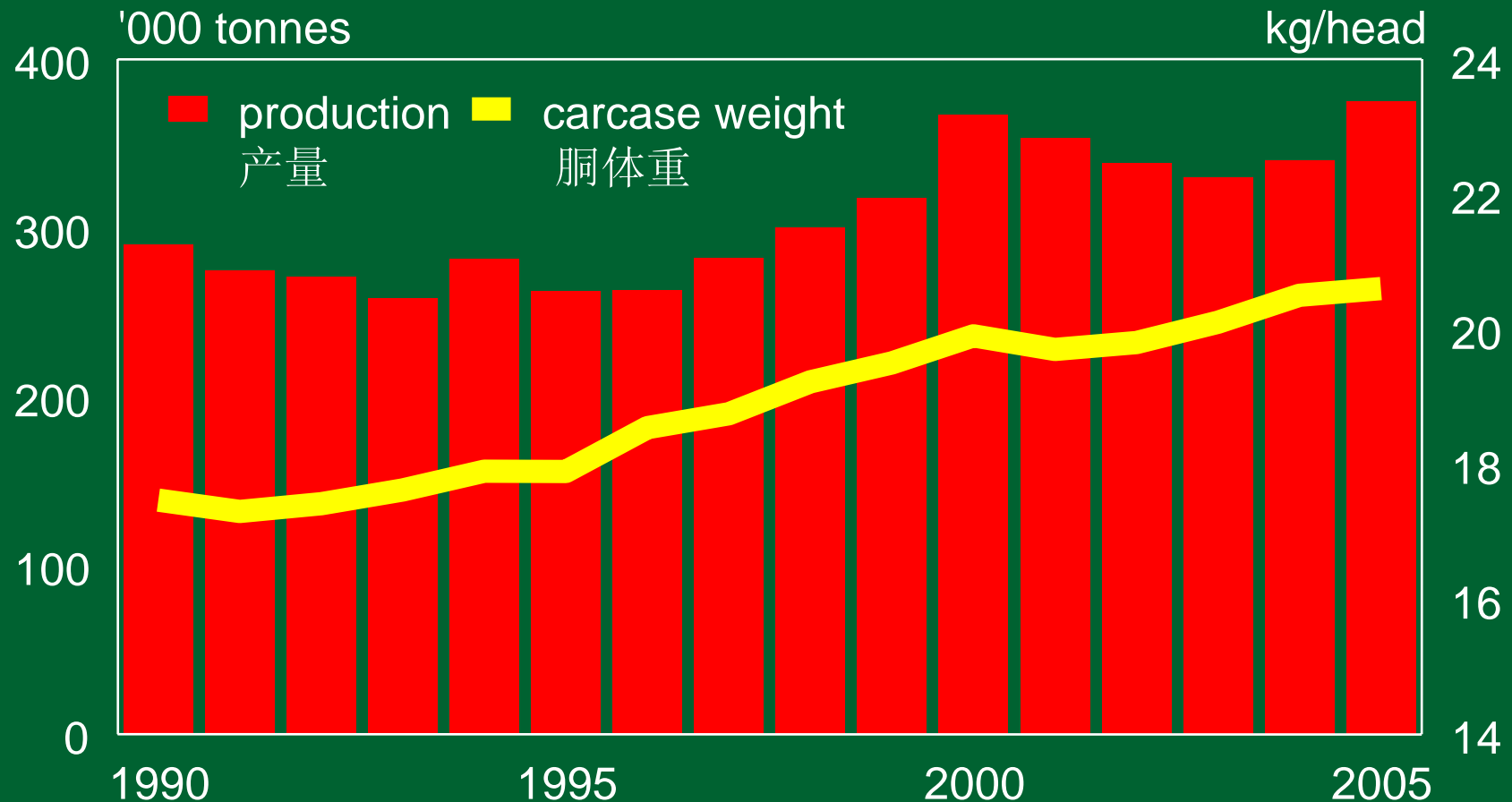
Australian sheep numbers

澳洲绵羊数量



Lamb production & carcass weights

羔羊产量与羊胴体重量分析



Utilisation of Australian sheepmeat

澳洲绵羊肉进出口分配



Export
出口

Domestic
内销

142,000 tonnes (sw)

141,000 tonnes (sw)

Lamb 羔羊肉

45%

55%

10 kgs / head

Mutton 成羊肉

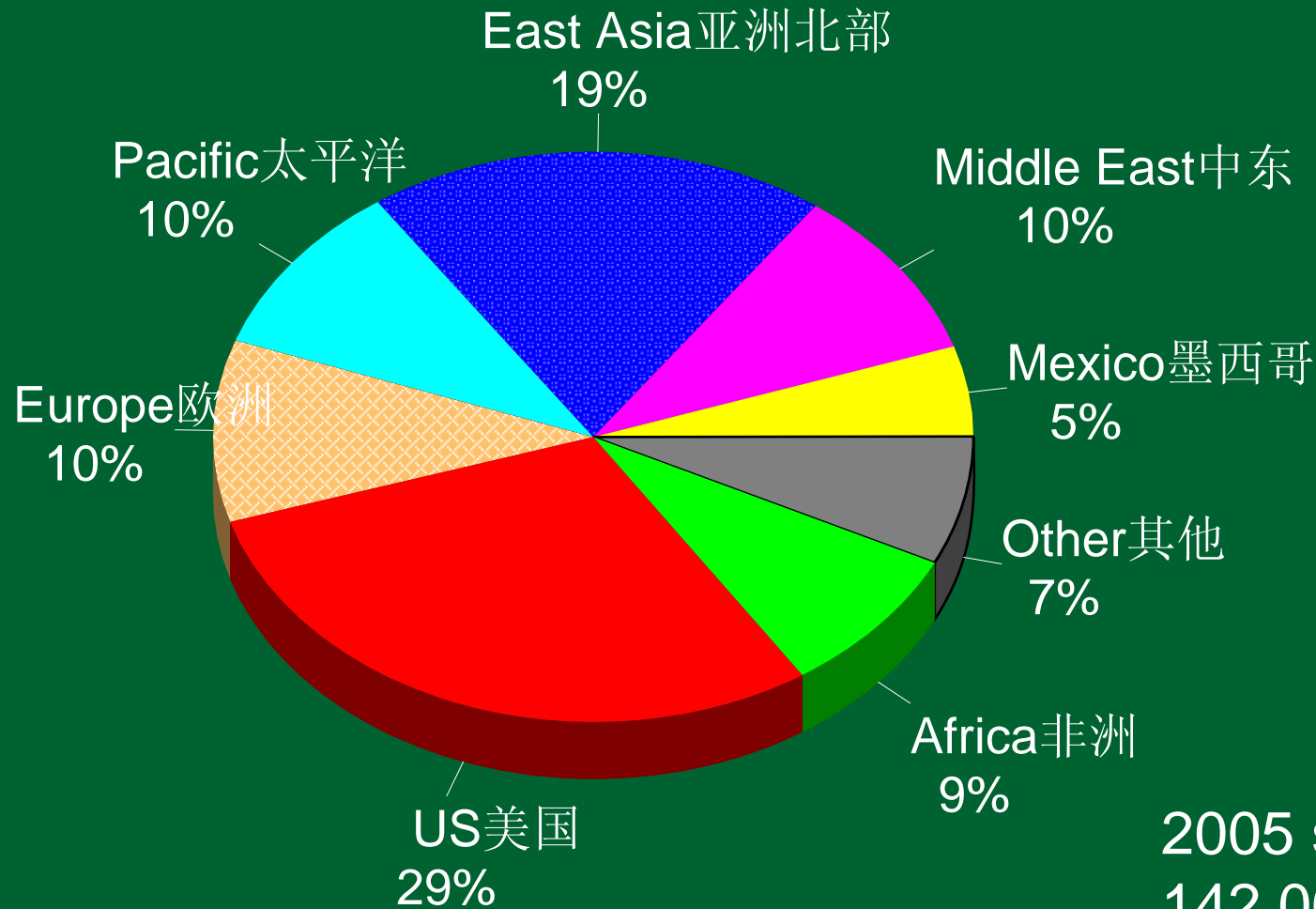
74%

26%

3.1 kgs / head

Australian lamb exports are globally focused

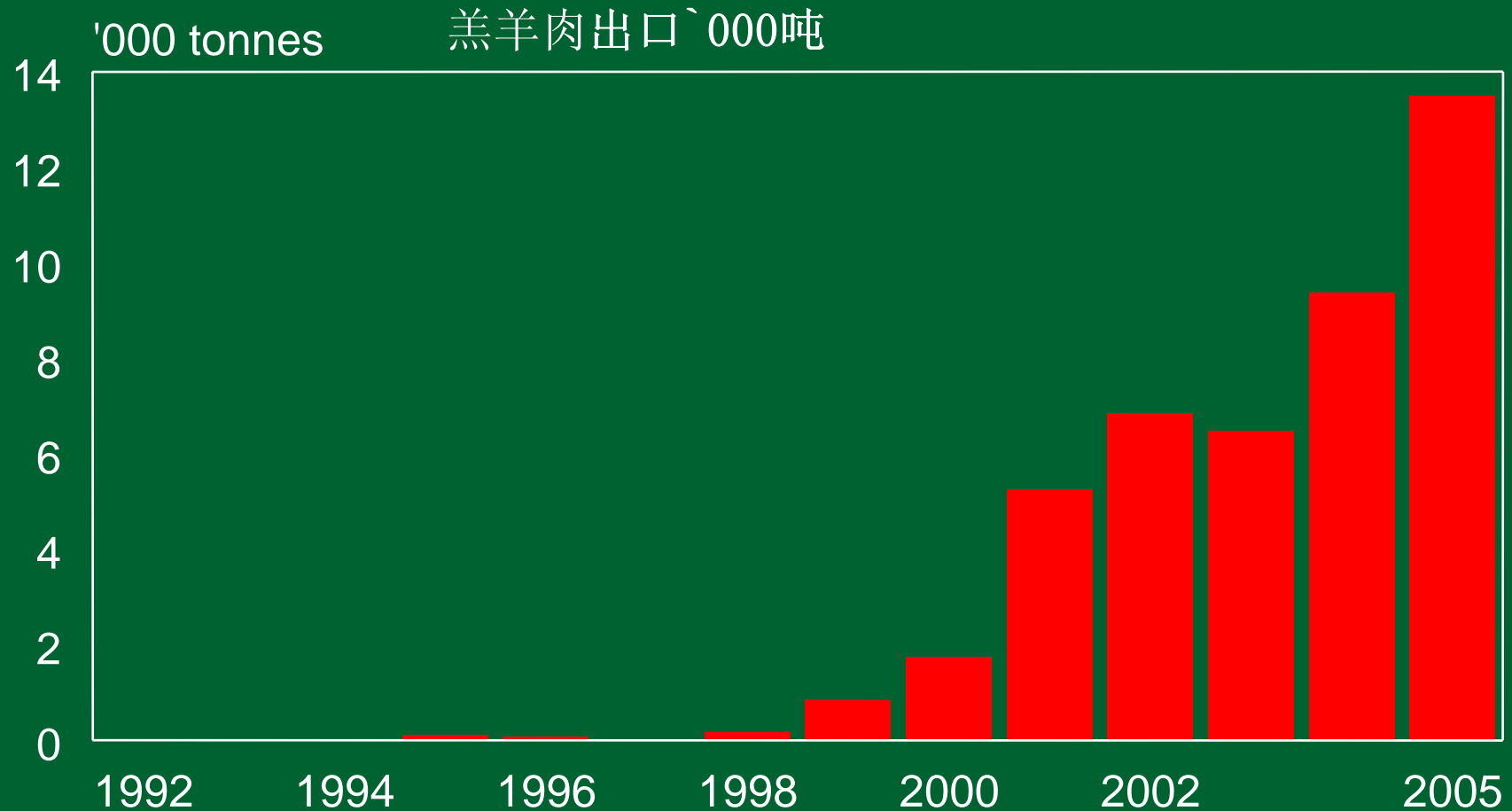
澳洲羔羊肉出口面向全球



2005 shipments:
142,000 tonnes

Australian lamb exports to mainland China

澳洲羔羊肉出口到中国的情况



Australian industry committed to
working with other industries to
improve beef & sheepmeat sales

澳洲产业界与其他产业通力合作促进
牛羊肉的销售

The Australian and Chinese industries working together 澳洲与中国产业界的合作



- 'Beef in China' Research '中国肉牛业的商务机遇与挑战'研究
- Sheepmeat Research 绵羊肉研究
- PhD Student research 博士研究生研究
- Memorandum of Understanding – CMA and MLA
谅解备忘录-中国肉类协会与澳洲肉类及畜牧业协会

It is vital to grow beef and sheepmeat consumption in China
扩大牛羊肉在中国的消费极为重要

Thank you
謝謝您!