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U.S. Alfalfa Exports to China Continue Rapid Growth

Report Categories:
Market Development Reports

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Report Highlights:

Chinese imports of alfalfa have soared from slightly over 2,000 MT in 2007 to 76,000MT in 2009, with continued rapid growth expected for 2010. Domestic alfalfa production is too low to meet growing demand from the domestic dairy sector as it recovers from a series of product safety scandals. As a result, Chinese dairy farms are turning to high quality imported fodder to increase milk production. Imports from the U.S. accounted for 97% of China's total alfalfa imports in 2009.

Executive Summary:

The Chinese market for alfalfa is large and has excellent growth potential, but is extremely price sensitive. At present the only hay product permitted to enter China from the United States, alfalfa is receiving increasing attention from Chinese dairy farms. Growing demand and limited availability of domestic product drove imports of U.S. alfalfa to 74,000 metric tons (MT) in 2009, up from less than 2,000 MT in 2007. With dairy sector demand estimated at 500,000 MT and Chinese bale processing volume estimated at 200,000 MT or less, demand for U.S. alfalfa has the potential to double in 2010 and continue to grow in future years. However, sustained growth will depend on price competitiveness with domestic alternatives. Continued promotion and farmer education is needed to continue to expand the market for U.S. alfalfa.

China's Alfalfa Imports Boom

Imports of Alfalfa into China (Metric Tons)

Quantity (MT)	2007	2008	2009	Q1&Q2 2010	2010 (est.)
United States	1,801	17,673	74,249	92,257	184,515
Australia	8	1,546	1,448	2,753	5,505
Mongolia	283	419	972	0	0
Canada	67	137	69	46	92
Total (MT):	2,160	19,798	76,750	95,079	190,157
Growth (%)		817%	288%		148%

Caption: 2010 estimate is a straight-line projection based on imports in first two quarters of 2010
Source: World Trade Atlas, 2010

Imports of U.S. alfalfa soared from under 2,000 MT in 2007 to 75,000 MT in 2009. In the first two quarters of 2010, China imported 95,000 MT of alfalfa, nearly all of which came from the U.S., according to World Trade Atlas. A straight-line projection for the full year, based on the first half of 2010, indicates that total U.S. alfalfa exports could reach 180,000 MT. This would make China an export market comparable in size to South Korea.

However, future export growth will depend on pricing. According to Dairyfarmer.com.cn, imported alfalfa prices in China (CIF basis) began rising in February from a low of $250/MT (actual RMB 1,700) to $272/MT (RMB 1,842) in June. After reaching a monthly average of 20,000 MT/month in March-May, imports dropped to 10,700 MT in June 2010 (still 160% higher than June 2009), reflecting the impact of rising prices. Sources differ on the level of price sensitivity, but agree that if CIF prices for standard grade U.S. alfalfa exceed RMB 2,700 ($400) imports will fall below 2009 levels.

Nonetheless, the market for alfalfa is far more mature than it was only a few years ago. Many dairy farmers, particularly in south China, see imported alfalfa as a necessity for their operations. Dairies in the north are also learning to build production volume by using high-quality fodder. By 2009, U.S. alfalfa had acquired a reputation for reliable quality among most dairy managers and animal nutritionists on large farms. This reliability is the key selling point in North China, where local alfalfa is often available at lower prices, but the quality is variable.

Dairy Drives Demand

China is the world's third largest dairy producer after India and the United States. In 2009, it maintained 12.8 million dairy cattle and produced 34 million tons of cow milk annually. The Chinese dairy industry is slowly recovering from the melamine-tainted milk scandals that emerged in 2008. At its nadir in mid-2009, consumption of dairy products fell to 15% below levels prior to the scandal. While consumption has been recovering since mid-2009, the sector has yet to rebound completely. Fodder comprises an estimated 30% of total production cost for milk, making Chinese dairies extremely price sensitive.

Not all producers were equally affected by the scandals. Larger milk producers and farms that procured milk from their own dairies and from close partners through contracts were better able to guarantee the safety of their products. As consumer demand returns, larger, more technologically advanced dairies are poised to reap the benefits of demand for verifiable milk supplies. Government policies have also strongly favored expansion of large-scale producers and reduction of the number of middle-men between dairies and milk processors. Large dairy processing firms are establishing farms approaching 10,000 head and smaller farms are seeking to expand. This trend towards agglomeration and large-scale production dramatically improves the opportunities for U.S. alfalfa exports to China.

The size of Chinese dairy operations matters for U.S. alfalfa exporters. Farms with over 1,000 head have the most skilled management and are less financially constrained when it comes to importing feed and fodder. High transaction costs mean that farms with fewer than 300 head are not likely to be direct buyers of imported alfalfa, and are instead likely to work through an importer/distributor or a larger dairy firm that can divide orders among multiple farms.

Although it is easier to market to the largest dairies, farms of between 200 and 1,000 head account for twice as many cows in total as those over 1,000 head, making medium-size farms the largest potential market for imported alfalfa. A 2009 survey of dairies of 200 head or more conducted found that most farms were between 200-1,000 head and had been established within the last decade. While nearly

70% of farms surveyed used alfalfa - including at least half of those between 200 and 1,000 head - most of it was domestic and the majority also used sheepgrass as a cheap alfalfa substitute. This shows that there is a considerable variety in demand for alfalfa, be it domestic or imported, among farms of over 200 head. Despite record imports, relatively few farms are using imported alfalfa at present, indicating substantial potential demand.

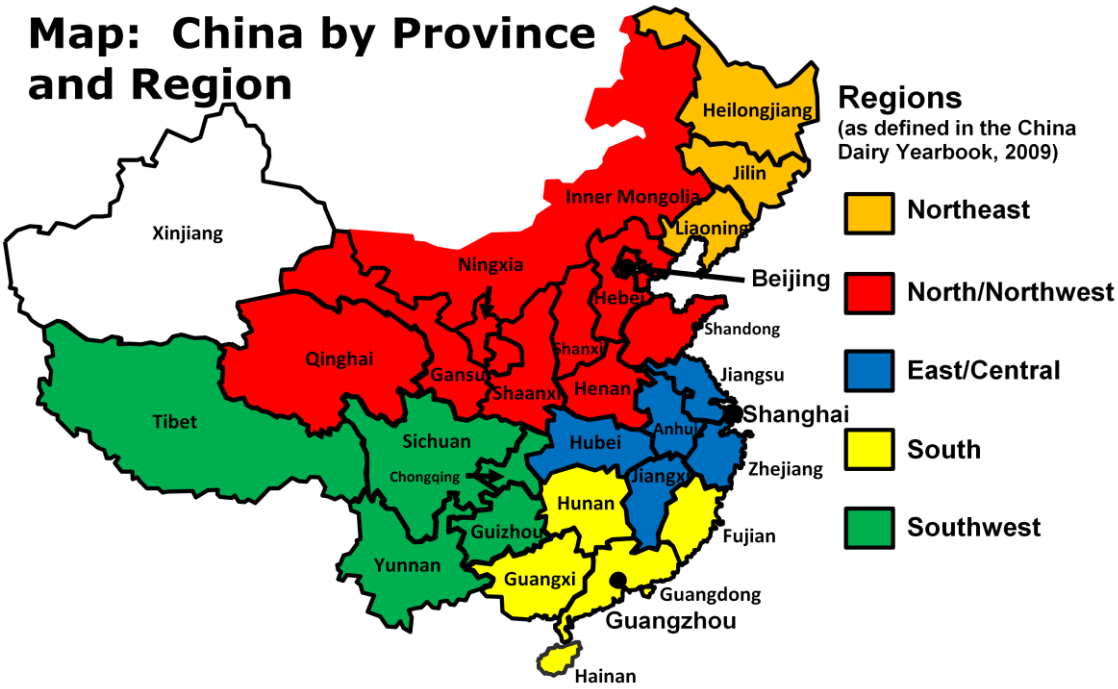
Despite the rush to expand the scale of dairy operations and reduce the role of middlemen, most dairy cows are still on farms of less than 300 head. With one expert estimating that only 5% of China's 12.8 million dairy cows are directly-owned by farms of over 300 head. The Chinese Ministry of Agriculture has set a target of 30% of cows in farms over 300 head by 2015, but the same expert considered 20% to be more realistic. Even this lower figure, however, would imply a quadrupling of the cattle population in farms large enough make effective use of U.S. alfalfa. Should the demand for alfalfa match the growth in large scale farms, dairy sector demand could reach some 2 million MT of alfalfa by 2015.

Sustainability

Price sensitivity is the largest threat to long-term import growth. It is possible that a strong recovery in the U.S. dairy market, with a consequent rise in fodder prices, could price-out many Chinese dairy farmers. Falling milk prices in China are also a risk to the sustainability of alfalfa exports to China. While the dairy industry is much more vigilant than in the past, new food safety scandals could further erode consumer confidence in the safety of Chinese dairy products. Should consumption decline again, raw milk prices would drop and some dairies would likely be unwilling to continue importing alfalfa.

Domestic Production Is Limited

Alfalfa is grown across north, northwest, and northeastern China, recently shifting from north China to northwest provinces of Gansu, Shaanxi, Ningxia, and Inner Mongolia. While total production has varied between 500,000 and 1,000,000 MT per year since 2006, both area and production have reportedly declined recently due to low profit margins and government incentives to plant grain. Most alfalfa is consumed locally, with little of it processed to the specifications required by the commercial dairy industry. Estimates of Chinese alfalfa bale processing volume range from 150,000 to 200,000 MT. By contrast, demand for alfalfa from the dairy industry is estimated at 500,000 MT.



Domestic production suffers from unsuitable climate and soils, poor harvesting methods, and low-tech processing. Domestic alfalfa bales vary between 12-16% crude protein (CP) with a relative feed value (RFV) <140, ranking as "fair" to "low" grade under USDA guidelines (Appendix 1). In Inner Mongolia, Ningxia, and Gansu (northwest China) the climate is suitable for alfalfa production, but the soils are saline-alkali and produce low yields. By contrast, in north and northeast China the soils are better, but weather conditions are too wet for effective field drying in the summer rainy season. Farmers producing alfalfa tend to be small-holders using low-quality equipment. The low density bales (under 280kg per cubic meter as compared to >450 kg per cubic meter for U.S. double-compressed bales) add to shipping costs, making rail transport unfeasible and truck transport expensive. In 2009, the additional cost to bring alfalfa from Gansu province to Beijing or Tianjin was $60-90/MT. For Shanghai, the additional cost was $74-103/MT, and for Guangzhou $118-132/MT.

Other obstacles to improved and expanded domestic production include low profit margins that drive growers to maximize yields at the expense of quality, and government subsidies that encourage farmers to grain instead. Planting alfalfa requires a high upfront investment while initial returns are low, and the land tenure structure in China discourages investment by businesses. Although Post has heard rumors of local governments, dairies, and investors collaborating to transfer irrigated land into large-scale alfalfa plantations, there is no evidence that such endeavors have begun.

Regional Market Differences Are Key

Ports Receiving More Than 1,000MT of Alfalfa Imports per Year:

Rank	2007	%	2008	%	2009	%	Jan-May	2010	%
1	Shanghai	45	Shanghai	76	Tianjin	44		Tianjin	43
2	Guangzhou	34	Tianjin	10	Shanghai	40		Shanghai	40
3			Guangzhou	9	Nanjing	4		Huangpu	6
4					Huangpu	3		Qingdao	3
5					Chongqing	2		Fuzhou	2

Caption: All locations importing over 1,000MT alfalfa per year and percent of total imports

Source: World Trade Atlas, 2010 (commodity code: 1214.9000)

Imported alfalfa finds its best markets in south China, followed by east China and central China, and does least well in the north/northeast/northwest. Initially, most of the demand for U.S. alfalfa came from the south and east of the country into ports such as Shanghai and Guangzhou. This began to change in 2008, when ports in north China, such as Tianjin, started to receive more imports (see table of ports). The early success of U.S. alfalfa in south and east China is due in part to the promotional efforts of the U.S. Agricultural Trade Office in Guangzhou, and in part to climatic and logistical conditions prevalent in the region. While there are far more cows in the northern areas, dairy farms in south and east & central China are larger (see table below) and tend to have more sophisticated managers. The hot, humid climate in the south also requires more careful formulation of feed rations to maintain milk volume, while higher milk prices justify the cost. Meanwhile, use of domestic hay is limited by long distances from producing regions and high internal transportation costs.

Distribution of Cows in Farms Over 200 heads by Region:

Region/Farm Size (heads)	200-500 heads	500-1000 heads	1000+ heads
North & Northwest China	40%	32%	27%
Southwest China	33%	33%	34%
Northeast China	37%	25%	38%
East & Central China	33%	27%	40%
South China	15%	38%	48%

North and Northwest: Hebei, Tianjin, Shanxi, Gansu, Ningxia, Shaanxi, and Qinghai, (data missing for Shandong, Henan, Inner Mongolia, and Beijing); Southwest China: Chongqing, Guizhou, Sichuan, and Yunnan (missing data for Tibet), Northeast China: Jilin, Liaoning (missing data for Heilongjiang); East & Central China: Hubei, Jiangsu, Jiangxi, and Shanghai (missing data for Anhui and Zhejiang); South China: Fujian, Guangxi, Hainan, and Hunan (data missing for Guangdong).

Note: Figures may not add to 100% due to rounding.

Source: China Dairy Yearbook, 2009

In north, northeast, and northwest China, alfalfa imports face competition from local alfalfa and sheepgrass, and a climate that allows cattle to tolerate lower quality fodder. Recent revision of the

national standard for protein in milk from 2.95% down to 2.80% has also taken some of the pressure off of north China's dairy farmers to improve fodder rations. Lower milk prices in the region constitute a further disadvantage for imported alfalfa. An April 2010 survey revealed that dairies in the Tianjin/Beijing area received RMB 3.2-3.6 per kilogram ($0.47-0.53) compared to RMB 3.8 ($0.56) in Shanghai and RMB 4.2 ($0.62) in Guangzhou. According to an expert on the dairy sector, farms must earn 3.0 RMB/kg for milk before feeding U.S. alfalfa becomes more profitable than domestic alfalfa. Large farms in Inner Mongolia and Heilongjiang have recently reported receiving as little as RMB 1.8-2.4/kg for their milk.

Price competition from domestic substitutes is more aggressive in this region. Surveys conducted from March-May of 2010, reported prices for Chinese alfalfa at $207-$295/MT in northwest China, versus $347-370/MT in East China and $280-325/MT in southwestern China. Chinese sheepgrass, a low quality alternative, sells at $148-192 in northern China and $236-$280 in southern China. Although U.S. alfalfa is recognized as superior, exporters must take into take into account the alternatives when pricing their product, particularly in the northern regions. The premium that farms are willing to pay for U.S. alfalfa will depend on each dairy's size, milk price, feed costs, and ability to finance imports. Shipping costs for containers of U.S. double-compressed bales within China average RMB 7/kilometer/container ($1/km/container) or RMB 0.28/MT/km ($0.04/MT/km) assuming 25 MT per 40 ft. container. Although this cost is lower per ton than for low-density Chinese bales, internal shipping costs make U.S. alfalfa most competitive in areas close to ports.

Marketing:

Recommendations for Market Entry:

1. **Find good importers/agents in China**
2. **Engage in education and promotion**
3. **Understand your customers' needs**
4. **Ensure reliable quality of bales**
5. **Closely observe AQSIQ protocol**

For U.S. exporters unfamiliar with China, finding a reliable Chinese partner is a crucial first step. The importer or representative should be able to handle all aspects of importing alfalfa into China and getting shipments through quarantine. (The national Ministry responsible for quarantine issues is AQSIQ, but local offices go by the name China Inspection and Quarantine, or CIQ). They will also need to have marketing connections with dairies, particularly to reach out to the small-to-medium sized market segment. It is recommended that all exporters meet directly with their importers and some of the end users prior to making their first shipments. Even exporters prepared to deal directly with farms,

will need to have an import agent or in-country representative to handle import procedures, marketing, communications, and payment.

Conferences, such as the annual China Dairy Conference & Expo and the China Animal Husbandry Expo, are a good way to become familiar with the Chinese market. However, marketing directly to dairy farmers may require engaging outside of typical expo venues. U.S. exporters have found that traveling to China to give seminars on how the use of alfalfa in feed rations have been very effective in building a customer base while conveying dairy management and feeding advice, as are farm visits by exporters and their distributors in China. Such exchanges greatly enhance connections with clients in a business culture that highly values face-to-face interaction. More information on the domestic dairy sector can be obtained from publications such as "Holstein Farmer" and "China Dairy." Holstein Farmer's website, www.hesitan.com carries price and trade data on feed and fodder as well as advertisements from domestic and foreign alfalfa suppliers.

Exporters to north China can expect that their clients will initially use very low alfalfa rations and demand lower grades of alfalfa (generally "good", "fair", or "premium" (See guidelines)). It is also likely that only high-producing, lactating cows will be fed with U.S. alfalfa while other cows receive lower cost local fodder. Exporters may need to work directly with farmers to convince them to increase alfalfa use or to use higher grades of alfalfa. Most large farms (>1,000 head), will test alfalfa for CP and, on occasion, RFV, but many may not know how to take a proper core sample. Among farms of less than 1,000 head, farmers may rely on appearance alone to judge quality. Under these circumstances, it is important to engage with dairy farmers and your distributor in China to resolve disputes and build a reputation for reliability.

While Chinese dairies are generally satisfied with the quality of U.S. alfalfa, there have been incidents of shipments with quality or quarantine problems. Isolated problems can prompt a strong response from the quarantine officials, with far-reaching impact. For example, a recent quarantine problem with alfalfa shipments from a single exporter led quarantine officials to closely scrutinize all imports from the same state. Exporters should be prepared for delays and expect AQSIQ to review their documents and containers in detail. Minor errors in paperwork can delay shipments for weeks. Demurrage charges are typically 250RMB ($37) per container per day, though they can be higher. Fumigation is no longer required for U.S. alfalfa bales, but contaminated shipments will either be fumigated at a cost of roughly RMB500 ($74), or returned or destroyed. All processers exporting to China must be registered with USDA's Animal and Plant Health Inspection Service (USDA/APHIS - see Appendix for APHIS contact information). Importers may find a list of APHIS registered facilities through AQSIQ's web site (www.aqsiq.com).

When making shipments, the choice of destination port will be based on the shipping costs from port to dairy. However, some shipping lines will only transport to certain ports. The ports of Tianjin, Shanghai, and Guangzhou have the most experience dealing with alfalfa imports and most exporters have experienced few problems clearing CIQ in these locations. However, smaller ports have less experience with alfalfa and delays are more frequent. Managing these problems will require an importer familiar with quarantine and customs processes and who can handle all documentation and communications with AQSIQ.

Appendices:

A1. USDA Alfalfa Guidelines

Quality Grade	RFV	ADF%	NDF%	TDN-100%	TDN-90%	Crude Protein %
Supreme	>185	<27	<34	>62	>55.9	>22
Premium	170-185	27-29	34-36	60.5-62	54.5-55.9	20-22
Good	150-170	29-32	36-40	58-60	52.5-54.5	18-20
Fair	130-150	32-35	40-44	56-58	50.5-52.5	16-18
Low	<130	>35	>44	<56	<50.5	<16

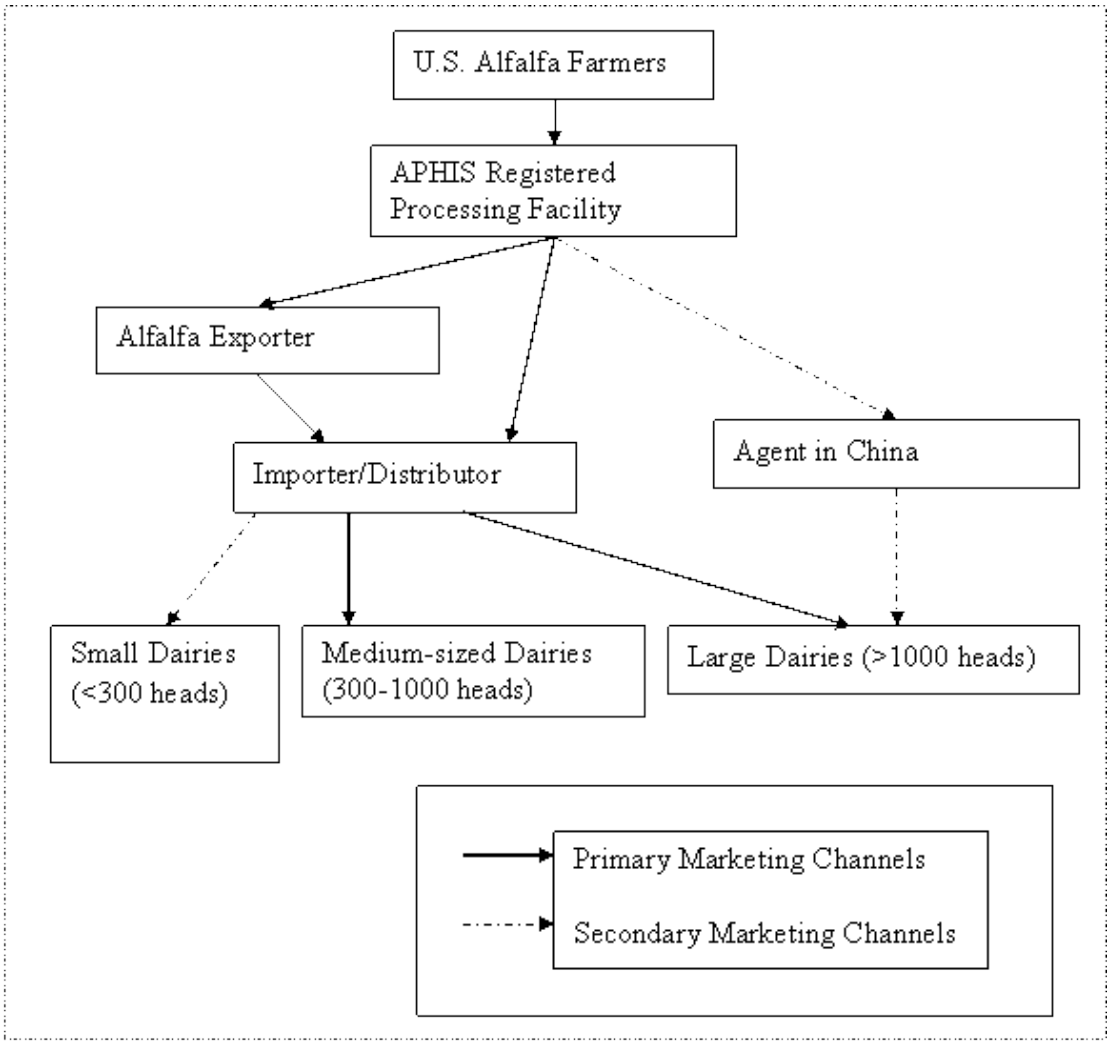
RFV calculated using the AFGC Formula.

TDN calculated using the western formula.

A2. SWOT Analysis

Strengths • Higher quality • Reputation for consistency • U.S. bales have lower shipping costs in China	**Weaknesses** • More costly, prices rising • Requires more time to obtain orders than domestic
Opportunities • Chinese dairy sector is recovering • Expanding scale of farms • Increasing awareness of U.S. alfalfa • Potential for appreciation of RMB	**Threats** • Delays in ports due to CIQ • Long-term competition from improved Chinese alfalfa • Increased competition from other alfalfa exporters • Many exporters not well known in China • Many importers unfamiliar with market

A3. Alfalfa Marketing Channels



A4. Sanitary and Phytosanitary Requirements for Import of Alfalfa Hay from the US to China (unofficial APHIS translation)

1. Quarantine Pests and Animal Diseases of Concern to China
See Appendix A5.
2. Requirements before shipment
2.1 Growing and Harvesting
2.1.1 Hay raw material growing, drying and storage places should be separated from animal feedlots and pastures and ensure to be free of animal waste, excreta and other articles.
2.1.2 The process of alfalfa hay harvesting, raking, baling in the field, bale collecting, field transportation and stacking beside the field should avoid mixing with miscellaneous roots, soil and other sundries.
2.1.3 Farms that export hay to China should have effective monitoring, prevention and integrated pest management measures to control and avoid the occurrence of quarantine pests of concern to China listed in Appendix 1 during the growing and harvest seasons.
2.2 Processing and Storage
2.2.1 Alfalfa hay for export to China must come from processing facility registered at US Animal and Plant Health Inspection Service (hereafter referred to as "APHIS").
- establish an effective tracing system;
- keep the processing area and facility clean and avoid across infestation.
2.2.2 Before baling, hay must have a process to exteriorly eliminate contamination and decontamination, and to insure compliance with the following requirements:
(1) Free of quarantine pests of concern to China listed in Article 1;
(2) Free of pests such as mites, mollusks, etc;

(3) Free of plant residues such as hay roots and seeds and other plant residues;
(4) Free of soil and animal excrement;
2.2.3 Before processing the alfalfa hay for export to China, if the facility is used for processing alfalfa hay not for export, the pressing and processing facility and the processing place should be cleaned and swept thoroughly.
2.2.4 Before loading, hay for export to China should be stored in the storage facilities with the following conditions:
(1) Have a relative independent closed space
(2) Take measures at entry and exit to prevent contamination by pests
(3) The floors of the facilities are clean and bright and easy to sweep. Have drainage system so as to sweep and disinfect
2.2.5 Hay for export to China should not be stored in the same storage house with alfalfa or other produces that are not for export to China. The storage house should be cleaned regularly so as to ensure the environment sanitary and clean.
2.3 Inspection before departure
2.3.1 Containers for shipping alfalfa hay to China should be clean. When necessary, the container should be swept and disinfected thoroughly against animal diseases.
2.3.2 APHIS should sample and inspect alfalfa hay for export to China before departure according to this provision. Having inspected and found eligible for exportation, official Phytosanitary Certificate should be issued follow the format of international standards noting hay name (e.g. Alfalfa Hay) , weight, destination, name and address of consigner and consignee, container number, Name of the processing facility (The registration numbers of the processing facility could be placed in the section of "Distinguishing Marks" of the certificate), County and State of growing area placed in the "Origin" section of the certificate; Having inspected and found live pests, hay should not be allowed to export to China, or having being fumigated and found eligible for exportation, hay will be allowed to be exported to China (Please find the Treatment Index in Appendix 2). For those being fumigated before departure, APHIS should note the information of concentration and duration of the chemical fumigation.
APHIS should note in the Additional Declaration of the Phytosanitary Certificate: "This shipment is inspected and compliance with China's sanitary and phytosanitary requirements of import alfalfa hay and it is free of quarantine pests of

concern to China".

Please see the sample Phytosanitary Certificates issued by APHIS in the Appendix 3.

2.3.3 There should be at least one packing mark in each container of each shipment noting the name of the processing facility, registration number and the typeface "To Be Exported to the People's Republic of China" in English.

3. Entry Inspection

3.1 Checking of Certificates

Check if certificates comply with the related provisions of Article 2.3.

Check if the American alfalfa hay to be imported is attached an Entry Animal and Plant Quarantine Permit issued by AQSIQ.

3.2 Checking of shipments

According to the above mentioned provisions in Articles 2.2.2, shipments of imported alfalfa hay will be inspected by opening the package at multiple sample points. When necessary, samples will be sent to laboratory for culture inspection under suitable conditions.

4. Non-compliance

Shipments will be fumigated, returned or destroyed if the following situations occur:

(1) No Phytosanitary Certificate issued by APHIS, or the certificate is not filled in a normative way.

(2) Not in compliance with the provisions in Article 2.2.2.

If violating the above mentioned situations, the Chinese side will consider the severity and take measures such as suspension of the processing facilities, production area, the whole program, etc.

Official Version available from:

http://dzwjyjgs.aqsiq.gov.cn/slaq/jjslaq/200901/t20090115_103816.htm

A5. Quarantine Pests and Animal Diseases of Concern to China

No.	Scientific Name
Insects	
1	*Bruchophagus roddi*
2	*Frankliniella occidentalis*
3	*Helicoverpa zea*
4	*Liriomyza trifolii*
5	*Naupactus leucoloma*
6	*Mayetiola destructor*
Fungi	
7	*Phymatotrichum omnivorum*
8	*Phytophthora megasperma* f.sp.*medicaginis*
9	*Verticillium albo-atrum*
Bacteria	
10	*Clavibacter michiganense* subsp. *insidiosum*
11	*Xylella fastidiosa*
Virus	
12	Alfalfa enation rhabdovirus
13	Peanut stunt virus
14	Tobacco ringspot virus
15	Tomato ringspot virus
Namatodes	
16	*Ditylenchus dipsaci*
17	*Xiphinema americanum*
Weeds	
18	*Amaranthus blitoides*
19	*Cenchrus echinatus*
20	*Convolvulus arvensis*
21	*Cuscuta campestris*
22	*Cuscuta epithymum*
23	*Emex australis*
24	*Lolium temulentum*
25	*Orobanche minor*
26	*Setaria parviflora*
27	*Solanum carolinense*
28	*Solanum elaeagnifolium*
29	*Sorghum halepense*

A6: USDA Offices:

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