

BEEF CATTLE

肉牛

Overview

Yunnan is endowed with vast grassland, rich forage and abundant feed resources. It features the independently raised “Yunling cattle” (the only breed that can adapt to the tropical and subtropical climate), as well as other 15 local beef cattle breeds. Yunnan boasts large beef cattle inventory, unique climatic and ecological conditions and geographical advantages for the development of beef cattle industry. The world’s beef supply falls slightly short of demand. For a long time, the supply of Chinese beef is hardly able to keep pace with the demand, while Japan, South Korea and the Middle East countries need to import a large number of beef. This provides a huge market for the development of beef cattle industry in Yunnan. The beef cattle industry is a competitive traditional industry in Yunnan province. Going forward, Yunnan will work to develop a better, stronger and larger beef cattle industry, and accelerate the realization of the goal of generating “100 billion output value from beef cattle industry”, so as to facilitate the development and structural adjustment of planting industry, promote the harmonious development of human and nature, accelerate the farmers’ poverty alleviation process and build a world-class green food industry.

综述

云南有广阔的草地与丰富的饲草饲料资源，有中国唯一适应热带亚热带气候、自主培育的云岭牛以及 15 个地方肉牛品种，肉牛存栏规模大，具有发展肉牛产业得天独厚的气候生态条件和区位优势。世界牛肉供应总体偏紧，中国牛肉长期供不应求，日、韩、中东各国需大量进口牛肉，为云南发展肉牛产业提供了巨大的市场空间。

肉牛产业是云南省传统优势产业，云南省将做优、做强、做大肉牛产业，加快实现“千亿肉牛产业”的目标，以此带动种植业发展与结构调整，促进人与自然和谐发展，加快农民脱贫致富，逐步打造世界一流绿色食品产业。

Product Mix

1. Production scale

From 2010 to 2016, the number of beef cattle raised in Yunnan increased from 9.63 million to 11.97 million. The number of sold beef cattle went up from 3.13 million to 4.9 million. Beef output increased from 360,000 tons to 620,000 tons. The beef cattle industry in Yunnan has made significant contributions to the increase in China’s beef cattle inventory. The growth of beef cattle stock and output in Yunnan has increased year by year. In particular, the annual growth of beef output has reached 26,000 tons, which is the fastest in China.

2. The Structure of Beef Cattle Industry



The rate of improved beef cattle in Yunnan is merely 30%, while the local cattle remains to be the major source of beef supply. There are about 3 million buffaloes raised in Yunnan, but the amount of beef supply is relatively low. There are more than 5,000 Dulong cattle (*Bos gaurus readei*) in Nujiang Prefecture and 70,000 yaks in Diqing Prefecture. The beef output is very limited, but with distinctive local characteristics, which plays an important role in improving the income of local farmers and herdsmen and developing local economy.

3. Industrial Scale

From 2010 to 2016, the output value of China's beef cattle industry accounted for 2.83%-3.44% of the national total output of agriculture, forestry, animal husbandry and fishery, while the output value of Yunnan's beef cattle industry accounted for 3.25% - 4.91% of the total output value of the agriculture, forestry, animal husbandry and fishery in Yunnan. In 2016, the average output of the beef cattle industry in Yunnan was 1.5 percentage points higher than the national average level of 3.41%. The contribution of beef cattle industry to the total output value of Yunnan's agriculture, forestry, animal husbandry and fishery is higher than the national average, and Yunnan beef cattle industry plays a more important role in the development of agricultural economy.

Major Enterprises

Yunnan Haichao Group Tingmu Beef Industry Co., Ltd.: The company was established in 2005 and covers an area of about 188 mu. It boasts one advanced mechanized production line and one 4000-m² beef processing workshop where more than 30,000 beef cattle are processed and 10,000 tons high-quality beef cattle products are produced each year. It is a leading enterprise that has integrated beef breeding, ecological breeding, mechanized slaughtering, standardized processing, cold-chain distribution, exclusive chain sales and high-end halal catering.

Yunnan Three Parallel River Agricultural Technology Co., Ltd.: The company is mainly engaged in beef cattle breeding; internet of things, internet technology development and system construction; organic fertilizer, feed processing and production. It is a key agricultural leading enterprise in Yunnan Province and a national construction base for the advancement of beef cattle industrial technology. It is also a demonstrating company for promoting the standardization of beef cattle products in China, certified by the Ministry of Agriculture as well as the Ministry of Finance. The company stands as the fourth largest "Yunling Cattle" raising center. It has established the "Internet + Beef Cattle Breeding" platform, and has set up a new business model of integrated, large-scale cattle breeding industry.

良种母牛—犊牛饲养—直线育肥—机械化屠宰—排酸嫩化—
精细分割—真空包装—速冻保鲜—冷链运输及销售

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结构

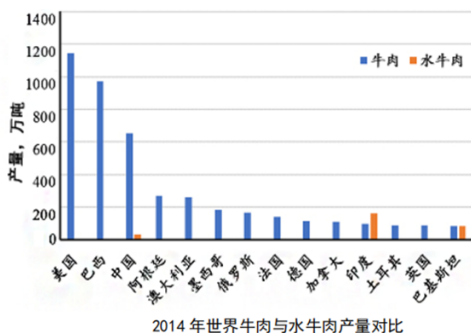
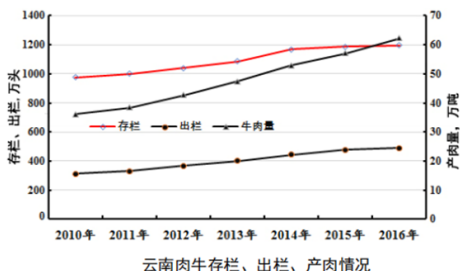
1. 生产规模

自 2010 年至 2016 年，云南肉牛存栏从 963 万头增加到 1197 万头，出栏从 313 万头增加到 490 万头，牛肉产量从 36 万吨增加到 62 万吨，对中国牛肉增加贡献较大。云南肉牛存栏、出栏逐年均有增长，特别是牛肉产量年均增长为 2.6 万吨，是全国增幅最快的省份。

2. 肉牛结构

云南肉牛良种化率仅为 30%，地方黄牛是牛肉供应的主体。云南水牛存栏约 300 万头，但提供的牛肉数量较低。怒江州的独龙牛与迪庆州的牦牛存栏分别为 5000 余头和 7 万余头，牛肉产量非常有限，但具有明显的地方特色，对提高当地农牧民收入、发展地方经济有重要作用。

3. 产业规模



2010 ~ 2016 年中国肉牛产业产值占全国农林牧渔业总产值的比例为 2.83% ~ 3.44%，云南肉牛产业产值占云南农林牧渔业总产值的比例为 3.25% ~ 4.91%，2016 年比全国 3.41% 的平均水平高出 1.5 个百分点。肉牛产业对云南农林牧渔业总产值的贡献高于全国平均水平，云南肉牛产业在农业经济发展中具有重要的地位。

2010-2016年肉牛产业在农业经济发展中的地位 (亿元、%)

年份	云南肉牛产业产值	云南农林牧渔业总产值	全国肉牛产业产值	云南农林牧渔业总产值	云南占比	全国占比
2010	67.0	1821.0	7997.0	69319.8	3.68	2.88
2111	75.0	2306.0	2299.0	81304.0	3.25	2.83
2012	99.4	2680.2	2653.6	89453.0	3.71	2.97
2013	136.5	3056.0	3184.7	96995.3	4.47	3.28
2014	147.1	3263.3	3519.7	102226.1	4.51	3.44
2015	149.9	3383.0	3623.6	107056.4	4.43	3.38
2016	178.3	3633.1	3826.0	112091.3	4.91	3.41

重点企业

云南海潮集团听牧肉牛产业股份有限公司：公司成立于2005年，占地约188亩，拥有先进的机械化生产线1条和4000m²的牛肉精深加工车间1座，年屠宰肉牛为3万多头，每年可生产高品质排酸牛肉10000吨。是一家集肉牛良种化繁育、生态化养殖、机械化屠宰、标准化加工、冷链化配送、专卖连锁销售、高端清真餐饮为一体的肉牛产业化龙头企业。

云南三江并流农业科技股份有限公司：主营肉牛养殖；物联网、互联网技术开发及系统建设；有机肥、饲料加工生产等。是云南省省级重点农业龙头企业、国家肉牛产业技术体系建设基地，同时也是农业部财政部认定的国家肉牛标准化典型示范场、中国第四大肉牛新品种“云岭牛”的重要育种人之一，搭建了“互联网+肉牛智能化云养殖”平台，建立了集约化、规模化肉牛养殖的新型商业模式。

