



2020 GLOBAL FEED SURVEY

奧特奇第九屆全球飼料調查

Data Collected in a Two-Part Survey

調查數據分為兩部份



Quantitative定量:

Numerical data collected

Qualitative定性:

Short answer responses

Quantitative Data 定量數據

來自145個國家
countries
represented

13 個畜種species,
including aqua, pets
and equine
包括水產、寵物和馬

主要畜種有豬、牛、
蛋雞和肉雞

Primary species
represented:
pigs, dairy, beef,
layer and broiler

分析評估國家，區域
和全球趨勢

Analysis evaluates country,
regional and global trends

Feed production expectations
預期飼料產量

Factors contributing to
consistency
促進一致性的因素

Consumer trends
affecting agri-food
影響農業食品的消費趨勢

Environmental
sustainability concepts and
initiatives
環境可持續性概念和倡議

The impact of
geopolitical tensions
地緣政治緊張局勢的影響

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Qualitative Questions 定性問題

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Effects of disease, including
imports and exports
疾病的影響，包括進出口

New advancements in
ag-tech
農業技術的新進步

Biggest opportunities
in the feed industry
飼料產業的最大機會

Biggest challenges in the feed
industry
飼料產業最大的挑戰

Trends in aquaculture
水產養殖趨勢

The background of the slide shows an industrial facility. In the foreground, there are large, conical piles of a dark, granular material, possibly sand or gravel. In the background, there are large metal structures, pipes, and a corrugated metal roof. The scene is brightly lit, suggesting an outdoor or well-lit indoor environment.

THE RESULTS 調査結果

Quantitative Data Analysis

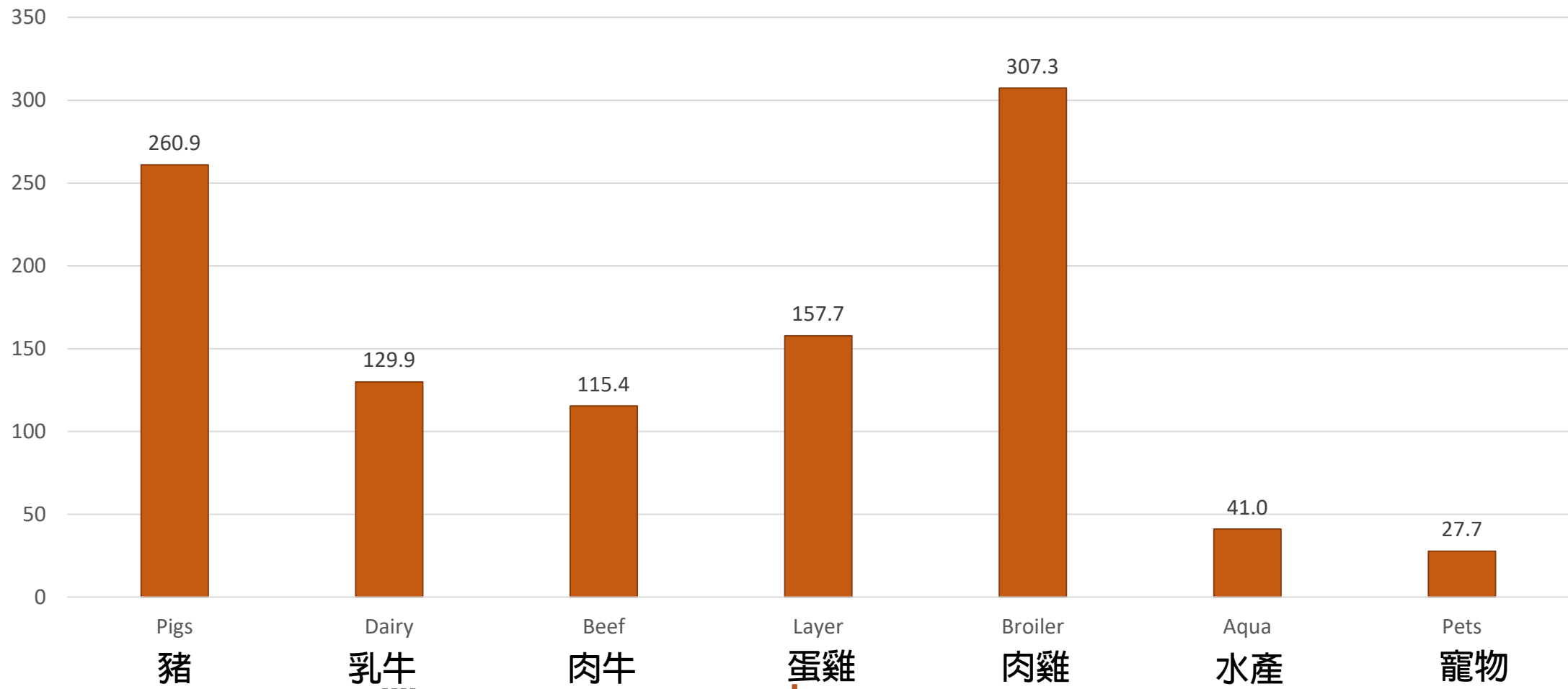


Global Feed Production Down 1 % 全球飼料生產量下降1%

Region	2018	2019	Percent Change %變化
Africa非洲	40.7	43.7	7.5%
Asia-Pacific亞太	384.5	363.2	-5.5%
Europe歐洲	278.8	279.2	0.2%
Latin America拉丁美洲	164.3	167.9	2.2%
Middle East中東	27.6	26.0	-5.8%
North America北美	232.2	236.0	1.6%
Oceania大洋洲	10.7	10.5	-1.3%
TOTAL合計	1,138.2	1,126.5	-1.0%

Feed Production by Species

飼料產量_依畜種分類



Numbers are in million metric tons 單位:百萬噸

Top 9 Countries of 2019

2019年飼料產量排名前9個國家

Country 國家	Feed Production 飼料產量	Primary Species 主要畜種
USA美國	214.4	肉牛, 豬, 肉雞 Beef, pig, broiler
China中國	167.9	肉雞, 豬, 蛋雞 Broiler, pig, layer
Brazil巴西	70.4	肉雞, 豬 Broiler, pig
Russia俄羅斯	40.5	豬, 肉雞 Pig, broiler
India印度	39.0	蛋雞, 肉雞, 乳牛 Layer, broiler, dairy
Mexico墨西哥	36.2	肉雞, 蛋雞, 豬, 乳牛 Broiler, layer, pig, dairy
Spain西班牙	34.8	豬, 肉牛, 雞牛 Pigs, beef, dairy
Japan日本	25.3	蛋雞, 豬, 肉牛 Layer, pigs, beef
Germany德國	25.0	豬, 肉牛 Pigs, beef

Numbers are in million metric tons 單位:百萬噸

各畜種在各地區之飼料產量

SPECIES BY REGION





Pig Feed Production 豬料產量

Region	2018 Pigs 豬料	2019 Pigs 豬料	Growth成長
Africa非洲	1.1	1.4	29%
Asia-Pacific亞太	125.4	93.3	-26%
Europe歐洲	80.1	79.5	-1%
Latin America拉丁美洲	31.5	32.2	2%
Middle East中東	0.0	0.0	0%
North America北美	52.7	53.1	1%
Oceania大洋洲	1.5	1.3	-7%

Swine Feed Down 26% in Asia-Pacific

亞太區豬飼料減少26%

Country國家	2018 Pigs 豬料	2019 Pigs 豬料	Percent Decline減少比率
China中國	79.600	51.740	-35%
Vietnam越南	11.037	8.720	-21%
The Philippines菲律賓	7.990	7.350	-8%
Japan日本	5.585	5.552	-1%
Thailand泰國	6.640	5.549	-16%
Taiwan台灣	3.080	3.017	-2%
Cambodia柬埔寨	0.900	0.700	-22%
Malaysia馬來西亞	0.700	0.680	-3%
Mongolia蒙古	0.028	0.027	-4%
Sri Lanka斯里蘭卡	0.008	0.005	-38%



Poultry Feed Production

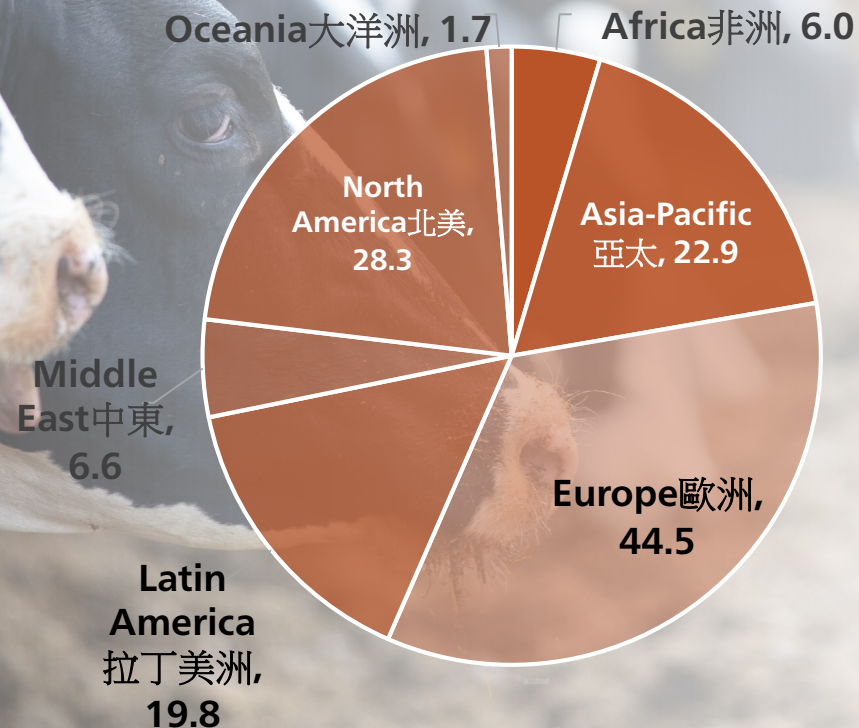
家禽飼料產量

Region	Layer蛋雞	Broiler肉雞	Turkey火雞	Other Poultry其他
Africa非洲	5.7	10.0	0.6	0.2
Asia-Pacific亞太	73.1	115.2	0.01	9.5
Europe歐洲	33.5	56.3	7.9	4.4
Latin America 拉丁美洲	24.0	61.8	0.3	0.1
Middle East中東	4.9	8.4	0.1	0.1
North America北美	15.5	51.8	9.8	0.2
Oceania大洋洲	0.9	3.8	0.1	0.1

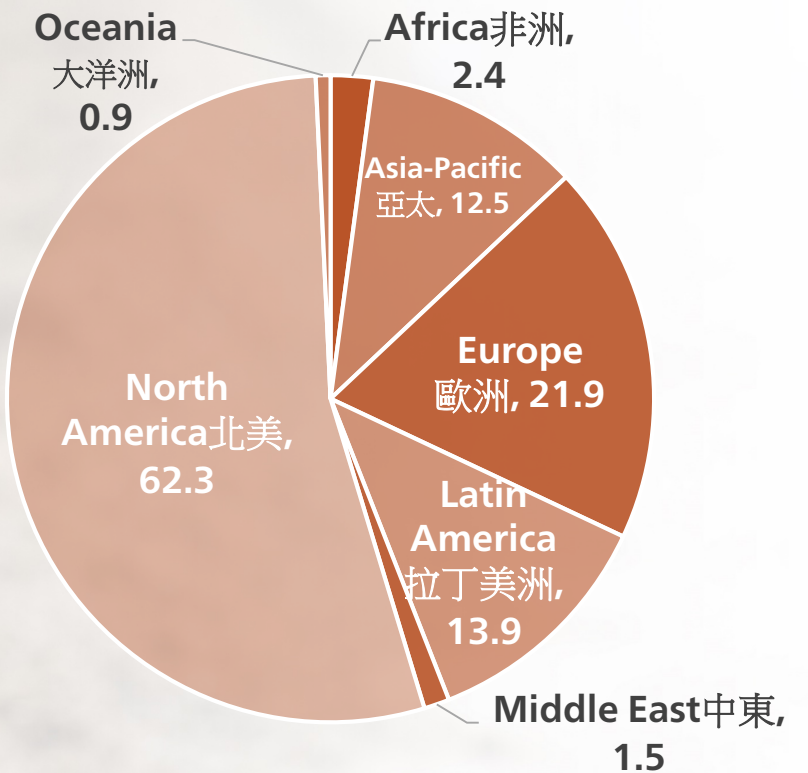
Numbers are in million metric tons單位:百萬噸

Ruminant Feed Production 反芻飼料產量

Dairy 乳牛



Beef 肉牛



Numbers are in million metric tons 單位:百萬噸

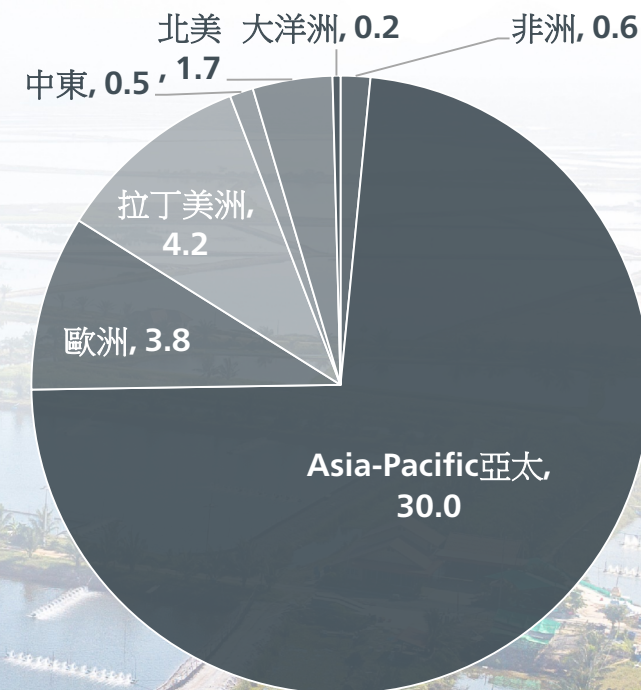
Aquaculture Feed Production 水產飼料產量

Per ton, Asia-Pacific grew the most with an additional 1.5 MMT. The primary contributors to this growth were China, Vietnam and Bangladesh.

總體而言，水產飼料比去年成長了4%。亞太地區成長最快，增加了1.5百萬噸，主要成長的國家有中國、越南和孟加拉。

Europe's decrease is in large part due to a decline in feed production in Russia, which is primarily due to an increase in imports.

歐洲的產量下降主要是由於俄羅斯的飼料產量下降，主要原因是進口量增加。



Pet Feed Production Up 4% Globally

全球寵物飼料生產量成長4%

The largest tonnage increases were seen in Asia-Pacific, Europe and Latin America.

成長最多的依次是亞太（10%），歐洲（3%）和拉丁美洲（6%）。

By country, primary increases were seen in China, Indonesia, Portugal, Hungary, Ecuador and Argentina.

依國家別區分，中國、印尼、葡萄牙、匈牙利、厄瓜多和阿根廷的總量都有所增加。



Region	Feed Production 飼料生產量	Growth成長
Africa非洲	0.4	13%
Asia-Pacific亞太	3.1	10%
Europe歐洲	8.8	3%
Latin America拉丁美洲	6.0	7%
Middle East中東	0.1	0%
North America北美	8.8	0%
Oceania大洋洲	0.5	0%

Numbers are in million metric tons單位:百萬噸

Equine Feed Production 馬飼料產量

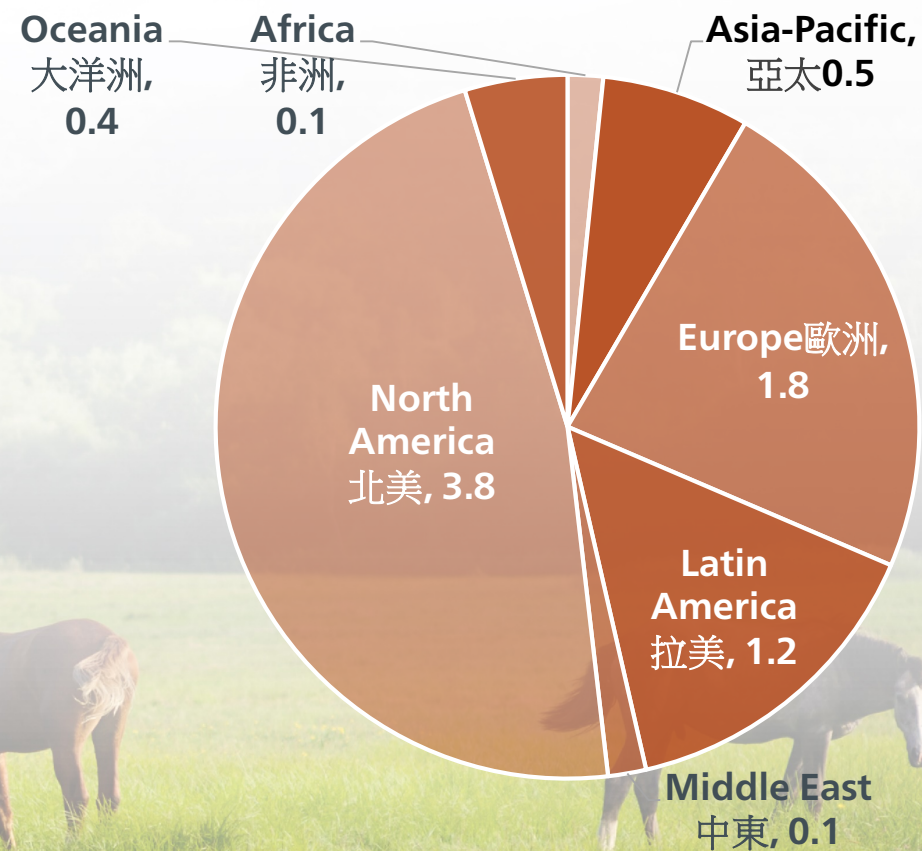
Globally, feed production estimations for the equine sector will remain relatively flat.

全球整體來說，養馬產業的飼料產量估計維持相對平穩。

North America continues to produce almost half of all horse feed (47.5%). 全球馬飼料將近一半產量(47.5%)由北美生產

Europe produces about 23%, with the other regions making up the remaining 28%.

歐洲產量約佔23%，其他地區佔其餘28%。





趨勢

THE TRENDS

Insight Gained from the Qualitative
Survey

定性調查中所獲資訊

 **Alltech®**

The Story Behind the Data 數據後的故事



African swine fever 非洲豬瘟

Changing consumer demands

消費者需求改變

Geopolitical tensions

地緣政治緊張局勢

Government regulation

政府監管

Environment and sustainability
環保及永續性

New technologies 新科技

African Swine Fever 非洲豬瘟

亞太區被非洲豬瘟重創導致:The Asia-Pacific region was significantly impacted

- 豬飼料生產下降26%

Pig feed production down 26%

- 蛋白質替代品產量提高: 蛋雞7%及肉雞6%

Protein alternatives up: Layer (7%) and broiler (6%)

- 受影響最大的國家：中國，柬埔寨，越南，泰國，菲律賓和蒙古Most affected countries: China, Cambodia, Vietnam, Thailand, the Philippines and Mongolia

歐洲也受到影響，主要是愛沙尼亞，拉脫維亞，立陶宛，羅馬尼亞，烏克蘭，保加利亞;

- 未受影響國家的豬價上漲20%
- Europe was also affected, primarily Estonia, Latvia, Lithuania, Romania, Ukraine, Bulgaria
 - Pig prices up 20% in unaffected countries

Changing Consumer Demands 消費者需求改變



Europe 歐洲

Animal welfare and
climate change
concerns

動物福利及氣候變化議題



Increase in
vegetarianism
and veganism
增加素食主義
和蔬食主義者

Latin America 拉丁美洲

Concern about GMOs
Desire for antibiotic-
free 關注因無抗所發生的
基轉議題



Interest in food
procurement
食品採購的喜好

地緣政治緊張局勢 Geopolitical Tensions

U.S.
美國

美國失去之前大部分出口中國
路線；不確定多久才會恢復

The U.S. lost much of its
previous export routes to
China; time will tell how
much ground it can regain.

China
中國

為拉丁美洲和歐洲市場創造了牛肉，
家禽和豬肉的機會。

The tiffs created positive
opportunities for Latin America and
Europe by reopening markets
specifically for beef, poultry and
swine.

Government Regulation 政府監管

亞太區:

中國支持養豬業的政策；

馬來西亞，孟加拉，汶萊，印尼亞和新加坡對重金屬的擔憂

歐洲:

荷蘭，波蘭和希臘減少飼養動物的數量

北美:

加拿大已開始徵收碳稅；

美國減少了抗生素生長促進劑

大洋洲:

紐西蘭政府發布了新的排放目標

Environment and Sustainability 環保及永續性

乾旱風暴：

澳大利亞，智利，愛爾蘭，荷蘭，羅馬尼亞，英國，摩洛哥，南非，美國，加拿大等

Discussion around climate change has left many countries uncertain about potential impact or government regulation.

有關氣候變化的議題使許多國家都對其潛在影響或政府監管有不確定性。

New Technologies 新科技

新興趨勢 EMERGING TRENDS:

監控和追蹤程序

Monitoring and tracking programs

無人機和GPS檢查牧場動物

Drones and GPS to check pasture animals

數字平台/乳牛管理

Digital platforms/cow management

機器人擠奶 Robotic milking

大數據與雲端計算

Big data and cloud computing

現況發展 ON THE HORIZON:

增加生物安全措施的技术

Tech to increase biosecurity measures

區塊鏈預計很快就會產生重大影響

Blockchain is expected to have significant impacts in the near future

減少牛的溫室氣體排放和腸內甲烷的技术

Tech to reduce greenhouse gas emissions and enteric methane in cattle



one

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MAY 17-19, 2020 | LEXINGTON, KY, USA

Changes in 2019 evaluations

為了持續提高數據的準確性，奧特奇今年的分析方式進行了修改：將大洋洲與亞太區的數據分開分析以反映更廣泛區域現況。此次調查調整了美國家禽和反芻動物的計算方式，以更準確地反映所需的飼料量。因此，我們利用新的計算方法調整了2018年的分析數值，以保持2018年和2019年的一致性和準確比較。

Avid readers of the Alltech Global Feed Survey may have noticed some changes to this year's analysis. Primarily, the Oceania region was separated from Asia-Pacific in order to follow a more widely accepted regional analysis.

Secondly, the beef feed production estimation was recalculated to improve its accuracy. The new estimate takes into account the average days on feed and intake as a percentage of body weight in the feedlot. Please note last year's estimation was also recalculated to reflect this formula change for a proper year-on-year comparison.