



绵羊奶全球化从东方开始

The Globalization of Ovine Dairy Industry

Rise in the East

Mar 14th



Part 1

东方，是世界乳品市场的新方向 A “East-Oriented” dairy market

全球乳品进入买方市场，东方市场依然在扩容

Global dairy market turns to a buyer's market, and the market size of the East is still growing

Part 2

东方，是绵羊奶市场的新方向 Ovine dairy market rise in the East

东方乳品消费市场对新品类接受度高，是绵羊奶品类的快速发展的基础

Eastern market welcomes new dairy category, which paves the way for the fast development of ovine dairy industry

Part 3

东方，是大家携手共进的新方向 Work together toward East

开拓东方市场，推进绵羊奶产业化商业化进程

Explore the East market, striving for the industrialization and commercialization of ovine dairy industry



Part 1

东方，是世界乳品市场的新方向 A “East-Oriented” dairy market

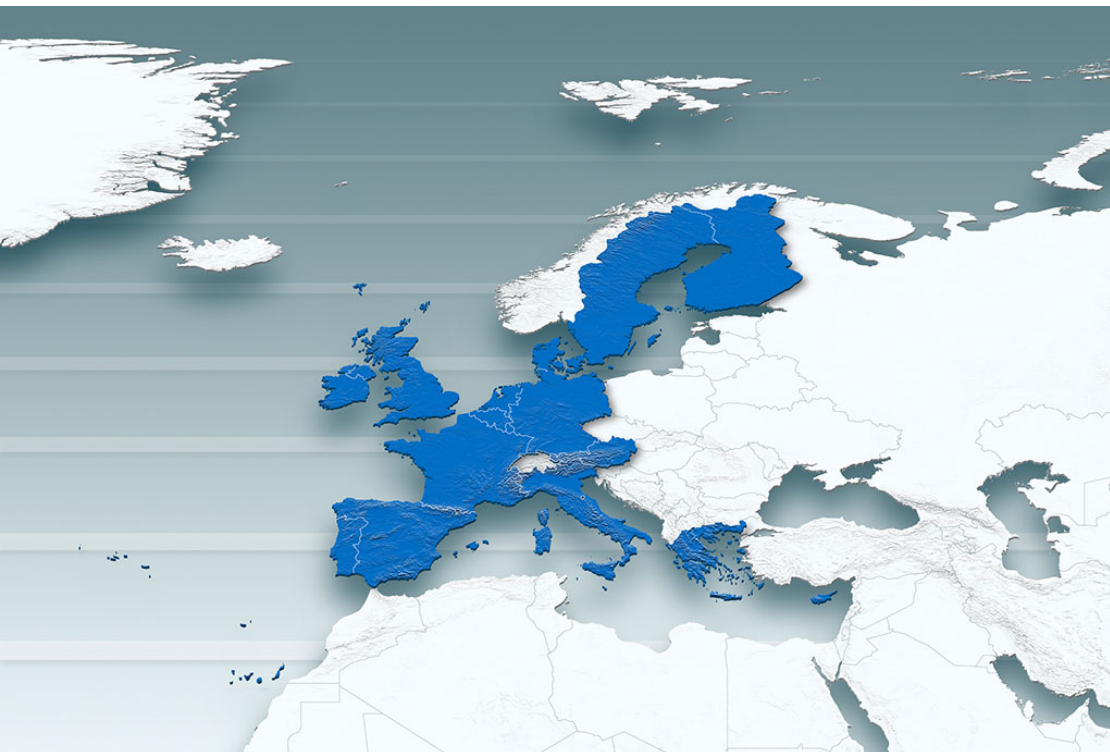
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牛奶市场的发展现状和未来趋势

Current Situation and prospect of bovine dairy market

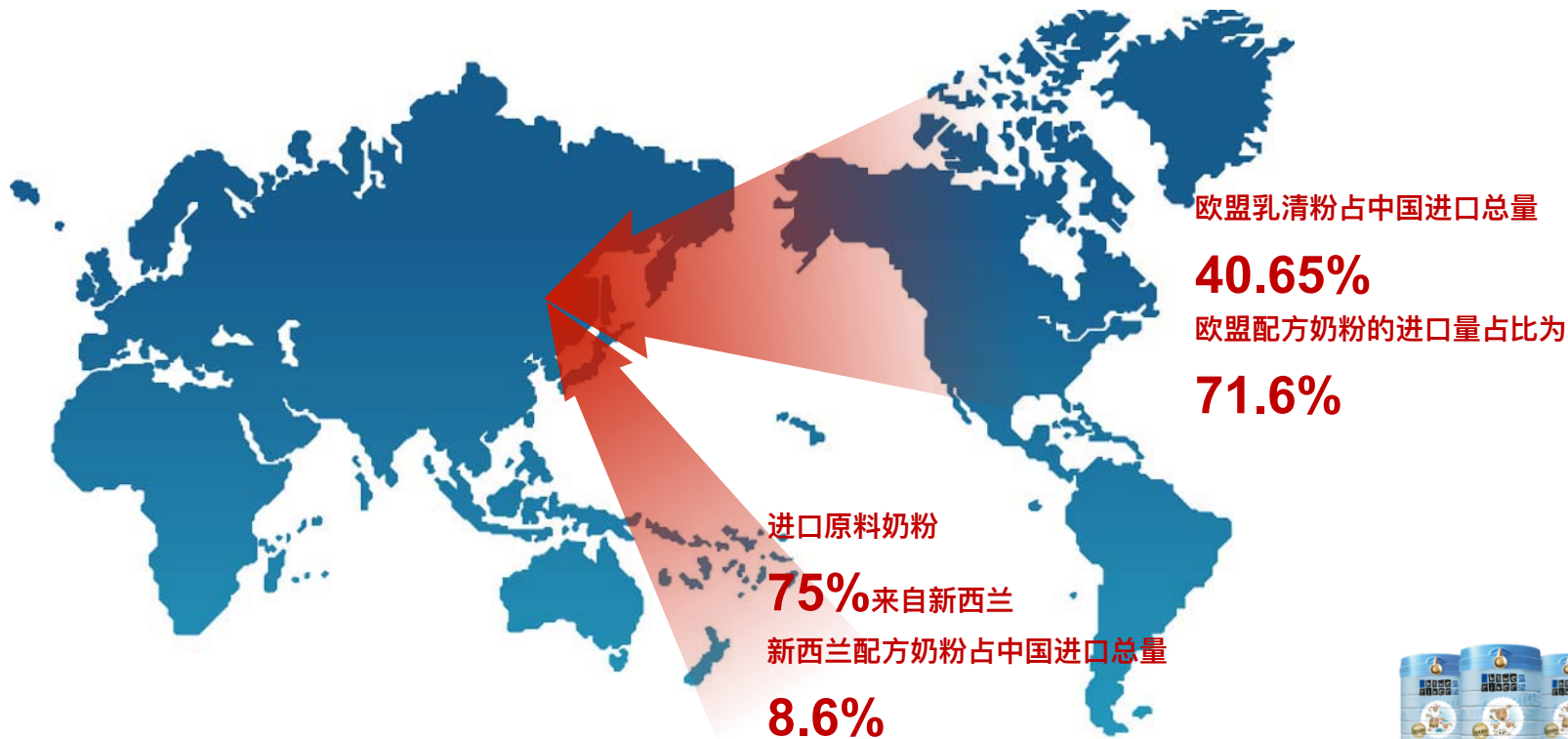


- 2015年4月1欧盟实施了近30年配额解禁，过剩牛乳冲击市场，市场需求疲软，全球奶价下跌；
EU milk quota removal, supply surplus
- 牛乳价格走低，在比利时、荷兰、爱尔兰和法国，价格一度低至30美分/L以下；
milk price falls
- 整体市场环境严峻，牛乳品类发展受限。
market environment is challenging, development of bovine dairy market is limited.



做为全球乳品进口大国，中国是大市场

China is still the biggest market for imported dairy products



中国乳品市场不断扩容，增量可观

Market demand in China remains positive



- 雾霾给中国经济和食品安全带来深远影响和隐患；Haze/ air pollution has brought profound impact and risk to China's economy and food safety
- 国民对食品安全意识的加强；Increased awareness of food safety and security;
- 进口食品、功能性乳制品越来越受欢迎；Imported food and functional dairy products are getting more and more preferred.

- 近5年，我国婴幼儿奶粉销售复合增长率保持在10%；Compound annual growth rate of infant formula sales turnover in the last 5 years maintains at 10%

- 二胎政策，将让乳品市场再增容20%

Loosening of one-child policy further provides demand



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中国乳品消费注重安全，信赖新西兰

Chinese consumers favor safety dairy products, trust NZ origin

资源优势

Resource Advantage

骑在羊背上的国家

- 绵羊数量庞大；
- 牧场资源丰富；

技术领先

Know-how

10年育种

新西兰有着世界领先的奶绵羊育种技术；

奶源安全

Safe Quality

85%首选安全

消费者调研显示，中国妈妈在选择奶粉的要素中首要考虑安全，占比高达85%。

监管严格

Strict Supervision

政府监管严格

- 动植物检验检疫严苛；
- 生产质量、出口把控严格





- 虽然中国经济在下行，但对于小孩的消费力仍然强劲；
Although China's economy slows down, consumption power for infant formula is still strong.
- 中国家庭特殊的421/422结构，6个大人养1个或2个孩子，具有坚实的消费基础；
the 421/422 family structure;
- 《2015国民家庭亲子关系报告》国民家庭每月育儿平均支出为3892元，是占国民家庭收入均值的2/3。
Statistic shows average per month expenses for one child is 3892rmb, account for 2/3 of the average family earning per month.



中国乳品消费升级，羊奶看涨

Goat/Sheep infant formula gets popular in China



➤ 高端化趋势，让羊奶看涨

据 [nielsen](#) 尼尔森调研显示：高端及超高端婴幼儿奶粉销售额占比已经从2013年的29%到2014年的**36%**，高价位羊奶顺应大势；**premium segment of infant formula grows.**

➤ 营养需求高，让羊奶看涨

营养成分是中国妈妈选购奶粉最看重的因素之一，占比高达**51%**，营养成分优越于牛奶的羊奶成为新宠。**High nutritional value**





➤ 功效驱动，妈妈换奶

对牛奶和乳糖过敏的宝宝越来越多

Intolerance to cow's milk and lactose is growing in Asia;

➤ 功效需求，成就快增长

Goat/Sheep milk has much higher tolerance than cow's milk

羊奶鲜明的功效特性，成就了羊奶粉连续3年50%的增长率。



中国乳品市场羊奶消费，亟待细分

Dairy market to be further diversified



1200亿的婴配市场；
目前羊奶婴配市场约30亿；
5年内预计达到120亿的；
山羊奶已先行一步，
绵羊奶需要快速切入。

但，受制于上游资源的发展
速度和规模。



- Infant formula market at a size of 120b;
- Yang formula has now a market size of 2b, and is expected to take 10% of the 120b in 5 years;
- Goat has seized a great part of it so far, and paved the way for her nicer-looking sister sheep;
- **BUT it is limited to the development of sheep milk resources.**





- 养殖奶牛带来的环境污染，用水用地问题日益突出；environment pollution , water and land use problems of bovine dairy
- 奶绵羊比奶牛对环境的污染小很多；Ovine dairy is more environmental friendly compared to bovine dairy;
- 长远地看，绵羊产奶产业化商业化的经济价值、社会价值比牛奶产业要更高；From a long term perspective, the economic value and social value of ovine dairy will be much higher than that of the bovine dairy;
- 新西兰推广绵羊产奶产业化商业化有得天独厚的条件，且将成为新西兰乳业一张新的名片 NZ has its advantageous condition for the industrialization and commercialization of ovine dairy industry, and this will be a new business card for the whole NZ dairy industry.



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蓝河，正在为新西兰绵羊奶品类全球推广努力

Blue River, NZ ovine dairy brand player

蓝河，在全球的舞台上，全力进行绵羊奶商业化的推广。

Blue River devotes to boost and develop the commercialization of ovine dairy.



蓝河绵羊奶粉
开启全球
会员招募

纽约时代广场

这是一场**品类革命**



人类进入“第三次”乳品革命，是时候，换奶啦！

100%新西兰极地牧场 100%原厂原罐原箱进口 无国界品质 100%绵羊乳蛋白

蓝河，愿与各方携手共进

Hand in hand, introducing NZ ovine dairy to the World

愿与政府携手，借助国家名片、国家的产业支持做大绵羊奶；

To seek for government's support to ovine dairy industry;

愿与行业携手，让更多奶农加入到养殖奶绵羊的队伍中来；

To attract more and more farmer to farm dairy sheep;

愿与科研携手，借助科学数据，做出绵羊奶产品标准。

To work with R&D third parties, standardize sheep dairy product quality;

愿与各行各业携手，为新西兰绵羊文化背书，做出绵羊奶文化价值；

To work with everyone, to endorse for NZ ovine dairy culture, build up cultural value





来自新西兰
100% 极地牧场
婴幼儿配方绵羊奶

让我们共同携手，
让绵羊奶全球化从东方开始！

**Hand in Hand, Striving for the Prosperity and
Development of Ovine Dairy Industry!**