TRENDS & DEVELOPMENTS OF THE CHINA FLOUR MILLING INDUSTRY

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PROFESSOR LI DONGSEN

MARK W. LYONS
China population: 1.4 Billion
50% consumes flour based foods

China wheat production:
About 120 MMT per year

China flour output:
About 65 MMT per year
(About 86 MMT milling wheat)
ANNUAL WHEAT OUTPUT MMT
1. Quantity:
   Total about 2,700 Flour Mill registered >200 MT
   World's largest flour mill groups:
   1. WUDELI Flour Mill Group 42,000 MT/day
   2. Yihai Flour Mill Group 21,000 MT/day
   3. COFCO Flour Mill Group 18,000 MT/day
   4. Total 6 flour mills 5,000 - 6,000 MT/day
   5. Total 5-6 flour mills 2,000 - 3,000 MT/day

   Top 15 flour mills about 40% market share.

2. Actual grind 85 million tons per year.
   Over capacity, intense competition.
TRENDS & DEVELOPMENTS

★ Larger storage capacity, 200,000-800,000t/large mill;
★ Mills are becoming larger, costs down;
  500T/d lower cost by USD 8/MT;
★ Use new milling technology & new equipment;
★ Higher automation, lower labor costs;
  3,000-4,000T/D mill only 3-5 operator/shift;
★ Extend to food processing, downstream operations;
WUDELI FLOUR MILL (4*1,000T/D)
TIANJIN LIJIN FLOUR MILL (4*500T/D)
COFCO FLOUR MILL (4*500T/D)

COFCO(Zhengzhou) Industrial Park Project
NO1: JINMAILANG FLOUR MILL (4*800T)
生产过程自动化 – 在线装车系统

高速打包, 直接发放装车:

六（双）工位打包机经装车码垛机直接装车，可实现85%的成品不进成品库，可大幅降低成本。
FLOUR BAG ONLINE LOADING SYSTEM
FLOUR BAG ONLINE LOADING SYSTEM
GGI ROBOT PALLETIZER
FLOUR MARKET BREAKDOWN

- Steamed bread: 30%
- Noodle: 35%
- Dumpling: 5%
- Bread: 5-6%
- Others: 4%
- Cake: 3%
- Biscuit: 7%
- Nang bread: 10%
- Steam bread: 30%

[Pie chart with similar percentages and labels as described]
Consumption:
30% : Steamed bread
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STUFFED STEAMED BREAD
FRESH NOODLE
NOODLES !^!
35%: Noodle
Consumption:

5-8% : Dumpling or Jiaozi, very popular
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