

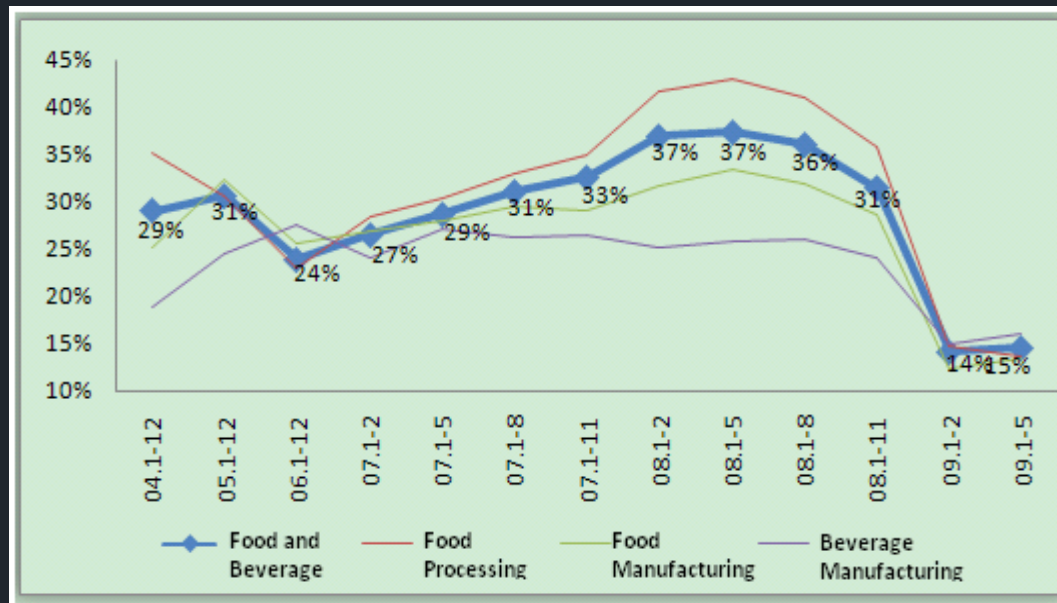
China Food and Beverage Industry Report, 2009



In the first half of 2009, China above-scale food industry accumulatively achieved RMB2.299 trillion of total output value, up 14.76% compared to the same period of last year, of which, the agricultural non-staple food processing industry's rose 15% to RMB1260.646 billion, the food processing industry's increased 14.55% to RMB407.909 billion, and the beverage manufacturing industry's rose 18.92% to RMB348.186 billion.

Impacted by the global financial crisis, the food and beverage industry's operating revenue changed from rapid growth momentum to downturn in H2 2008. During Jan-Feb 2009, the revenue of the overall food and beverage industry increased only 14% year on year, 23 points lower than that of Jan-Feb 2008, recording new low in recent years. The growth rate in Jan-May 2009 rebounded a little to 15%.

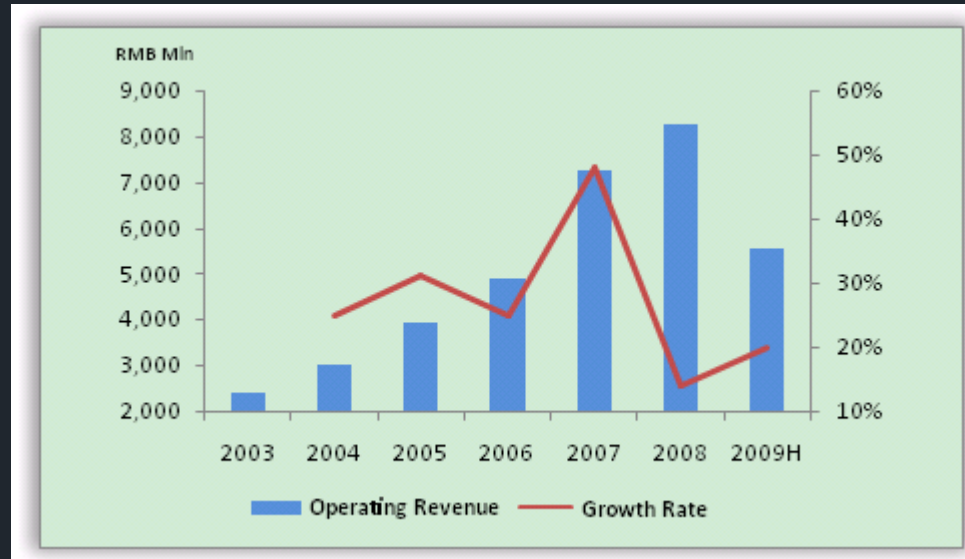
Operating Revenue Growth of China Food and Beverage Industry and Its Sub-industries, 2004-2009



Source: Wind; ResearchInChina

In the past several years, the operating revenue of the food processing industry, one sub-industry of the whole food and beverage industry, has grown faster than that of the other two sub-industries, food manufacturing and beverage manufacturing. Due to the price decline of meat products (mainly pork), the food manufacturing industry rebounded slowly during the financial crisis, while the beverage manufacturing industry showed certain decline-resistance ability, whose operating revenue rebounded steadily during Jan-May 2009, up 16% year on year, 1 point higher than the figure in Jan-Feb 2009 and higher than the average level of the whole food and beverage industry. Taking Kweichow Moutai Co., Ltd for example, its liquor output in H1 2009 was 23,833 tons, up 35.9% year on year; its sales revenue went up 20% to RMB5.5 billion and net profits rose 25% to RMB2.8 billion.

Operating Revenue and Growth Rate of Kweichow Moutai Co., Ltd, 2003-2009



Source: Kweichow Moutai Co., Ltd; ResearchInChina

In H1 2009, the high-alcohol Moutai liquor products took 84.27% of the company's operating revenue, while the low-alcohol liquor products accounted for 9.63%.

Based on the authoritative statistics from the National Bureau of Statistics of China, the China National Food Industry Association, China Alcoholic Drinks Industry Association, Dairy Association of China, etc, this report makes an in-depth analysis of the status quo of China's food and beverage industry and its influencing factors, giving priority to the analysis and research of its eight sub-industries on market scale, industry concentration, regional distribution, economic benefits, production & sales as well as growth space. Besides, It also predicts the future development trends of the industry.

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