China Aquaculture Industry Report, 2010

Jan. 2011
This report

◆ Analyzes the aquaculture industry as a whole and


Please visit our website to order this report and find more information about other titles at www.researchinchina.com

Related Products

China Beer Industry Report, 2009-2010

China Drinking Water Industry Survey Report, 2010

China Health Food Industry Report, 2010

China Liquor Industry Report, 2009-2010

China Food and Beverage Industry Report, 2009-2010

China Resin Industry Report, 2009-2010
Abstract

Alongside with the improving living standard of people, the consumption of high-protein aquatic products goes up year by year, and the robust demand drives the output of aquatic products to grow ever. In 2009, China’s output of aquatic products achieved 51.20 million tons, up 4.6% from a year earlier. As far as the product mix is considered, the output of seawater products has an annually bridging gap with that of freshwater products in percentage, with a share of 52.4% and 47.6%, respectively.

China increases its export volume of aquatic products with the soaring demand in overseas market. In the first three quarters of 2010, the export volume and value of aquatic products of China reached 2.302 million tons and USD 9.52 billion respectively, an increase of 8.9% and 25.6% from the same period of last year. Of all, prawn, shellfish, tilapia, eel and large yellow croaker are still major exporting varieties, with the total export value providing 50.2% of the total export value of aquatic products.

As for the unit export price, eel and large yellow croaker gained the huge growth by 38.7% and 43.4% respectively. Coastal provinces like Shandong and Guangdong are the major exporters of aquatic products which are largely exported to the US, Japan and South Korea.

Outputs of Seawater Products and Freshwater Products in China, 2005-2009 (mln tons)

Source: NBS; ResearchInChina
Concerning the processing of aquatic products, the operating income of aquatic product processing enterprises has increased since 2006. Between January and August of 2010, the yields of the industry totaled RMB 198 billion. When it comes to the sub-industries, the frozen processed food market experiences a burgeoning demand influenced by the dietary habit of consumers. In Jan.-Aug. 2010, the operating income of this sub-industry reaped RMB 150.5 billion, contributing 76% of the whole aquatic products processing industry. However, the soaring cost in refrigerating storage, transportation and procurement resulted in the meager gross margin which fluctuated between 11% and 12% during 2006-Aug. 2010.

HOMEY Group International is mainly engaged in the cultivation of sea cucumber and jelly fish products with higher gross margin. In the first half of 2010, the gross margin of the company realized 47.1%. HOMEY Group International plans to expand the sea cucumber cofferdam breeding area to 50,000 mu by 2014. And it is expected to see a potential growth in the profit for the company thanks to the rich aquatorium resources.
Dalian Yiqiao Marine Seeds Co., Ltd, a domestic flagship enterprise involved in the breeding of rare seafood seed, focuses on the cultivation and sales of sea cucumber and shrimp seeds. In the first half of 2010, the operating income of the company recorded RMB 140 million, with the integrated gross margin reaching 45.4%, higher than its counterparts. However, the downstream industry of the company concentrates in Liaoning Province by region which means the converged sales regions, thus bringing risk in operation.

Zhanjiang Guolian Aquatic Products Corp. Ltd. and Zhangzidao Fishery Group are both typical industry integrated enterprises; wherein, the revenue of the former is primarily sourced from the processing and exporting of prawn; while the latter focuses on the breeding of patinopecten yesoensis and abalone which features higher gross margin. Dahu Aquaculture Company Limited, committing itself to freshwater fish products, launched brand strategy in 2010 and established the designated sales outlets of fresh and live aquatic products, expanding its selling markets towards Southwest China from Central South. In addition, Shandong Oriental Ocean Sci-Tech Co., Ltd is specialized in export business of aquatic products with the business pattern of “Aquaculture plus Aquatic Product Processing”, and the company in 2010 dabbled in salmon breeding, in a move to further perfect its product structure. In the same year, Guangdong Haid Group Co., Ltd. which placed aquatic feed as its major business also introduced fish & shrimp seed business and was involved in aquatic products seed breeding sector, ushering into an era of industry integration.
1. Overview of Aquaculture Industry
   1.1 Basic Concepts
   1.2 Product Types
   1.2.1 Regular Aquatic Products
   1.2.2 Famous Products
   1.2.3 Superior Products for Export

2. Operation Environment of China Aquaculture Industry, 2010
   2.1 Industry Policy
   2.1.1 Regulation on Quality Safety Management of Aquaculture
   2.1.2 Organic Certification Standard
   2.2 Ecological Environment

   3.1 Market Development
   3.2 Supply & Demand
   3.3 Aquatic Products Processing

4. Market Segments of Aquatic Products, 2010
   4.1 Regular Fish Market
   4.2 Shrimp & Crab Market
   4.3 Terrapin Market
   4.4 Shellfish Market
   4.5 Rare Seafood Seed

5. Import & Export of Chinese Aquaculture Products, 2010
   5.1 Overview
   5.2 Import & Export
   5.2.1 Export Varieties
   5.2.2 Exporting Province
   5.2.3 Export Market
   5.2.4 Contracting Export Volume of Processing Products
   5.2.5 Import Volume Keeps Growing

6. Aquaculture Regions in China, 2010
   6.1 Fujian
   6.1.1 Output
   6.1.2 Import & Export
   6.2 Shandong
   6.2.1 Output
   6.2.2 Import & Export
   6.3 Jiangsu
   6.3.1 Output
   6.3.2 Import & Export
   6.4 Liaoning
   6.4.1 Output
   6.4.2 Import & Export
   6.5 Guangdong
   6.5.1 Output
   6.5.2 Import & Export
   6.6 Zhejiang
   6.6.1 Output
   6.6.2 Import & Export

7. Key Enterprises
   7.1 Dalian Yiqiao Marine Seeds Co., Ltd
   7.1.1 Profile
   7.1.2 Operation
   7.1.3 Advantages & Development Strategy
   7.2 Zhanjiang Guolian Aquatic Products Co., Ltd
   7.2.1 Profile
   7.2.2 Operation
   7.2.3 Advantages & Development Strategy
   7.3 Guangdong Haid Group Co., Ltd.
   7.3.1 Profile
   7.3.2 Operation
   7.3.3 Development Strategy
   7.4 HOMEY Group International
   7.4.1 Profile
   7.4.2 Operation
   7.4.3 Development Strategy
   7.5 Dahu Aquaculture Company Limited
   7.5.1 Profile
   7.5.2 Operation
   7.5.3 Development Strategy
   7.6 Shandong Oriental Ocean Sci-Tech Co., Ltd
   7.6.1 Profile
   7.6.2 Operation
   7.6.3 Development Strategy
   7.7 Zhangzidao Fishery Group
   7.7.1 Profile
   7.7.2 Operation
   7.7.3 Development Strategy
   7.8 Guangzhou LUXE Seafood ENT.LTD
   7.8.1 Profile
   7.8.2 Operation
   7.8.3 Development Strategy
   7.9 Xunshan Group
   7.9.1 Profile
   7.9.2 Development Strategy
   7.10 Dalian RainLion Group
• China’s Five Major Supporting Policies on Aquaculture Industry and the Influence
• Percentage of Established Sea Properties by Utilization Type in China, 2009
• Output and YoY Growth of China Aquatic Products, 2005-2009
• Output of China Seawater Products and Freshwater Products, 2005-2009
• Per Capita Consumption Expenditure and Its Growth of Aquatic Products and Food of Chinese Residents in Urban Regions, 2005-2009
• Number of Aquatic Product Processing Enterprises in China, 2006-Aug. 2010
• Number of Enterprises in Aquatic Product Processing Sub-industries of China, 2006-Aug. 2010
• Operating Income and Total Profit of China Aquatic Product Processing Industry, Jan.-Aug., 2006-2010
• Gross Margin of China Aquatic Product Processing by Sub-industry, Jan.-Aug., 2006-2010
• Operating Income and Total Profit of China Aquatic Product Processing by Sub-industry, Jan.-Aug., 2006-2010
• Output of Saltwater Fish and freshwater Fish of China, 2006-2009
• Output of Saltwater Shrimp & Crab and Freshwater Shrimp & Crab of China, 2006-2009
• Market Prices of Common Testudinate Germchit in China, 2010
• Output of Saltwater and Freshwater Shellfish in China, 2006-2009
• Rare Seafood Breeding Enterprises in China
• Export Volume and Percentage of Major Aquatic Products in China by Type, 2009
• Export Volume and Value of China Aquatic Products by Product, Jan.-Sep., 2010
• Provinces (China) Exporting Aquatic Products and Export Volume, 2009
• Provinces (China) Exporting Aquatic Products and Export Value, Q1-Q3, 2010
• Major Export Markets and Export Volume of Aquatic Products in China, 2009
• Major Export Markets and Export Value of Aquatic Products in China, Jan.-Sep., 2010
• Import Volume and Import Value of Major Aquatic Products in China, Jan.-Sep., 2010
• Market Share of Major Imported Aquatic Products in China, Jan.-Sep., 2010
• Output of Saltwater and Freshwater Aquaculture Products in Fujian, 2004-2009
• Export Volume and Value of Aquatic Products in Fujian, Jan.-Aug., 2010
Output of Saltwater and Freshwater Aquaculture Products in Shandong, 2004-2009
Export Volume and Value of Aquatic Products in Shandong, 2008-2009
Import & Export of Aquatic Products in Shandong, Jan.-Oct., 2010
Output of Saltwater and Freshwater Aquaculture Products in Jiangsu, 2004-2009
Export Products and Value of Aquatic Products in Jiangsu, Jan.-Jun., 2010
Major Export Markets and Export Value of Aquatic Products in Jiangsu, Jan.-Jun., 2010
Output of Saltwater and Freshwater Aquaculture Products in Liaoning, 2004-2009
Import & Export Volume and Value of Aquatic products in Liaoning, Jan.-Oct., 2010
Market Share of Major Exported Aquatic Products in Liaoning, Jan.-Oct., 2010
Output of Saltwater and Freshwater Aquatic Products in Guangdong, 2004-2009
Major Exported Aquatic Products in Guangdong, 2009
Major Imported Aquatic Products in Guangdong, 2009
Output of Saltwater and Freshwater Aquaculture Products in Zhejiang, 2004-2009
Variety, Volume and Value of Major Exported Aquatic Products in Zhejiang, Jan.-Sep., 2009-2010
Export Destinations, Export Volume and Export Value of Aquatic Products in Zhejiang, Jan.-Sep., 2010
Operating Income of Dalian Yiqiao Marine Seeds by Sector and Product, Jan.-Jun., 2010
Operating Income of Dalian Yiqiao Marine Seeds by Region, Jan.-Jun., 2010
Vertical Integrated Industry Chain of Zhanjiang Guolian Aquatic Products Co., Ltd
Operating Income and Net Income of Zhanjiang Guolian Aquatic Products, 2007-Sep.2010
Operating Income, Operating Profit and Net Income of Zhanjiang Guolian Aquatic Products, 2007-Sep.2010
Major Businesses of Zhanjiang Guolian Aquatic Products by Variety, H1 2010
Operating Income, Cost and Gross Margin of Guolian Aquatic Products, H1 2010
Selected Charts

- Operating Income and YoY Growth of Guolian Aquatic Products by Region, H1 2010
- Production Edge of Guolian Aquatic Products
- Product Varieties and Applications of Guangdong Haid Group
- Operating Income and Net Income of Guangdong Haid Group, 2006-Sep.2010
- Major Businesses of Guangdong Haid Group by Sector, Jan.-Jun., 2010
- Operating Income and Gross Margin of Guangdong Haid Group by Product, Jan.-Jun., 2010
- Business Pattern of HOMEY Group International
- Operating Income and Profit Margin of HOMEY Group International by Product and Sector, 2009
- Operating Income and Profit Margin of HOMEY Group International by Product and Sector, Jan.-Jun., 2010
- Sea Area Resources of HOMEY Group International
- Operating Income and Profit Margin of Dahu Aquaculture Company Limited by Product and Sector, Jan.-Jun., 2010
- Waters Area and Yield per Mu of Shandong Oriental Ocean Sci-Tech
- Major Businesses and Gross Margin of Shandong Oriental Ocean Sci-Tech by Sector, Jan.-Jun., 2010
- Major Businesses of Shandong Oriental Ocean Sci-Tech by Region, Jan.-Jun., 2010
- Operating Income and Gross Margin of Zhangzidao Fishery Group by Product, Jan.-Jun., 2010
- Major Businesses and Gross Margin of Zhangzidao Fishery Group by Sector, Jan.-Jun., 2010
- Operating Income and Net Income of Zhangzidao Fishery Group, 2007-Sep.2010
- Major Businesses and Percentage of Zhangzidao Fishery Group by Region, Jan.-Jun., 2010
- Five Largest Industry Bases of Dalian RainLion Group
You can place your order in the following alternative ways:

1. Order online at www.researchinchina.com
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: report@researchinchina.com
4. Phone us at +86 10 82600828/ 82600893

<table>
<thead>
<tr>
<th>Party A:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
<td></td>
</tr>
<tr>
<td>Address:</td>
<td></td>
</tr>
<tr>
<td>Contact Person:</td>
<td>Tel</td>
</tr>
<tr>
<td>E-mail:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Party B:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
<td>Beijing Waterwood Technologies Co., Ltd (ResearchInChina)</td>
</tr>
<tr>
<td>Address:</td>
<td>Room 1008, A2, Tower A, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080</td>
</tr>
<tr>
<td>Contact Person:</td>
<td>Liao Yan</td>
</tr>
<tr>
<td>E-mail:</td>
<td><a href="mailto:report@researchinchina.com">report@researchinchina.com</a></td>
</tr>
<tr>
<td>Bank details:</td>
<td>Beneficial Name: Beijing Waterwood Technologies Co., Ltd</td>
</tr>
<tr>
<td></td>
<td>Bank Name: Bank of Communications, Beijing Branch</td>
</tr>
<tr>
<td></td>
<td>Bank Address: NO.1 jinxiyuan shijicheng, Landianchang, Haidian District, Beijing</td>
</tr>
<tr>
<td></td>
<td>Bank Account No #: 110060668012015061217</td>
</tr>
<tr>
<td></td>
<td>Routing No #: 332906</td>
</tr>
<tr>
<td></td>
<td>Bank SWIFT Code: COMMCHNBJG</td>
</tr>
</tbody>
</table>

Choose type of format

- Hard copy ........................1700 USD
- PDF (Single user license) ..........1600 USD
- PDF (Enterprisewide license) ......2400 USD

※ Reports will be dispatched immediately once full payment has been received. Payment may be made by wire transfer or credit card via Paypal.