

China Aquaculture Industry

Report, 2010

Jan. 2011

This report

- ◆ Analyzes the aquaculture industry as a whole and
- ◆ Highlights the operation and development of the leading domestic enterprises, including HOMEY Group International, Dalian Yiqiao Marine Seeds Co., Ltd, Zhanjiang Guolian Aquatic Products Co., Ltd., Zhangzidao Fishery Group, Dahu Aquaculture Company Limited, Shandong Oriental Ocean Sci-Tech Co., Ltd and Guangdong Haid Group Co., Ltd.

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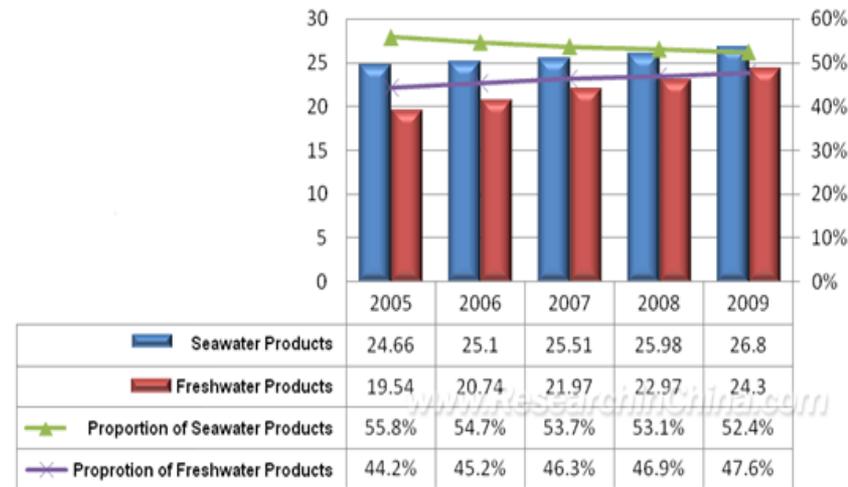
Abstract

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 aquaculture 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)

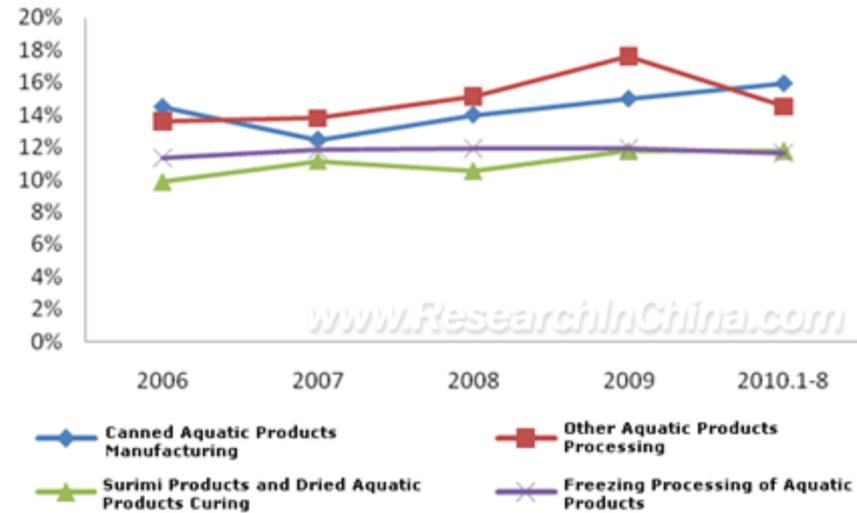


Source: NBS; ResearchInChina

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.

Gross Margin of Aquatic Products Processing in China by Sub-industry, Jan.-Aug., 2006-2010



Source: WIND; ResearchInChina

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.

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Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
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