China Edible Vegetable Oil Industry Report, 2010-2011

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This report

- **Analyzes development of edible oil industry in China.**
- **Focuses on status quo of segmentations of edible oil industry.**
- **Highlights the competition, marketing strategy and development of key enterprises in edible oil industry.**

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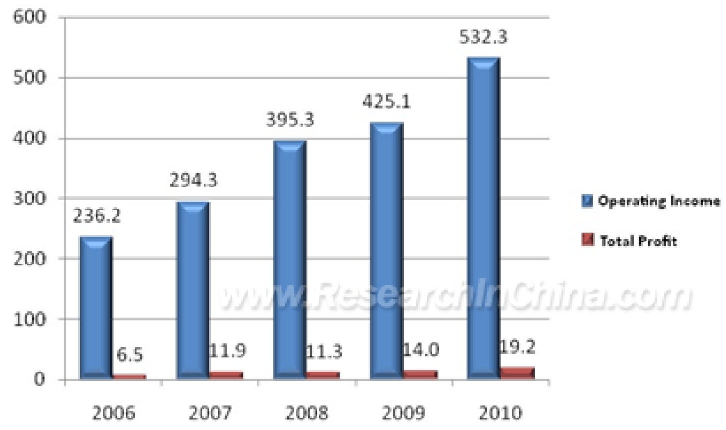
Abstract

In recent years, the output and consumption volume of edible vegetable oil keeps rising. The operating income of edible oil industry in China rocketed from RMB236.2 billion to RMB532.3 billion during 2006-2010, with a CAGR of 22.5%; the total profit nearly tripled from RMB6.5 billion to RMB19.2 billion with a CAGR of 30.9%.

Operating Income and Total Profit of Edible Vegetable Oil Industry in China, 2006-2010 (RMB bn)



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In regard to the consumption ratio of edible vegetable oil, the top 3 varieties are soybean oil, palm oil and rapeseed oil. In 2010, consumption volume of rapeseed oil reached 10.5 million tons, accounting for 40% of the total consumption of edible oil.

The palm oil consumption volume in China achieved 6.2 million tons, among which the imported volume registered 4.31 million tons occupying 70% of the total.

In the market of rapeseed oil, its consumption volume took up 19% of the total consumption volume of edible oil. However, influenced by the low yield of rape seed, the supply of rapeseed oil falls short of market demand in China. Besides, healthy minor category oil such as corn oil and tea seed oil experience rapid development thanks to people's concept of healthy diet.

This report not only introduces the overall situation of edible oil industry and status quo of segmentations, but also specifically analyzes competition, marketing strategy and development trend among foreign enterprises, state-run enterprises and private enterprises in edible oil industry.

In 2010, key edible oil enterprises in China included Yihai Kerry Investment Co., Ltd., COFCO, Shandong Luhua Group Co., Ltd., Shandong Xiwang Group Co., Ltd., Dongling Grain & Oil Co., Ltd., and Heilongjiang Jiusan Oil & Fat Co., Ltd. In particular, the competition between Yihai Kerry and COFCO was most intense. Yihai Kerry employed the strategy of diverse products and multi-brands, including Arawana, Gold Ingots and Orchid etc. Products of COFCO covered soybean oil, blend oil and sunflower oil etc. At first, COFCO concentrated on the development of Fortune, and then rendered multi-brand marketing strategy, jointly with ADM introducing high-end brands “Zicai” and “SOLIVA”.

In addition, Shandong Xiwang Group Co., Ltd., Three Star Group, and Shanghai Standard Foods Co., Ltd held certain market shares in the markets of corn oil and sunflower oil.

With the increasingly fierce competition of the edible oil market, the enterprises will not only aggressively explore new marketing channels but perfect the layout of industrial chain in the future.

In respect of distribution channel, edible oil enterprises have developed such sales terminals as regular chains and online shops in recent years. Concerning regular chain, Yihai Kerry adopted this mode in 2006, and COFCO and Jiusan Oil and Fat entered in 2009 and 2011 respectively. COFCO launched online platform—www.womai.com.

For industrial chain, multinational corporations such as Yihai Kerry and Cargill take advantage of industrial chain integrating planting, processing and marketing. Under the tight supply of oil and fat raw materials, Chinese enterprises also take the initiative to establish their planting bases overseas with the aim of controlling upstream material and by degrees completing layout of industrial chain.

Table of contents

1.Varieties of Edible Oil and Industry Overview

2. Development of Edible Oil Industry in China
2.1 Operation
2.1.1 Key Enterprises
2.1.2 M&A
2.1.3 Overcapacity of Soybean Crush
2.2 Output
2.3 Consumption
2.4 Price
2.5 Foreign Capital Involved in Chinese Edible Oil Market

3. Edible Oil Market Segments in China
3.1 Soybean Oil
3.2 Peanut Oil
3.3 Rapeseed Oil
3.4 Corn Oil
3.5 Olive Oil and Palm Oil
3.6 Blend Oil

4. Key Enterprises
4.1 Yihai Kerry Investment Co., Ltd.
4.1.1 Profile
4.1.2 Key Crushing Plants
4.1.2.1 Qinhuangdao Jinhai Grain and Oil Industrial Co., Ltd.
4.1.2.2 Qinhuangdao Jinhai Food Industry Co., Ltd.
4.1.2.3 Southseas Oils & Fats Industrial (Chiwan) Ltd.
4.1.2.4 Yihai Kerry (Yanzhou) Oils & Grains Industries Co., Ltd.
4.1.3 Segmentations Strategy
4.1.3.1 Small Package Edible Oil
4. 1.3.2 Characteristics of Soybean Oil Development
4.1.3.3 Corn Oil
4.1.3.4 Rice Bran Oil
4.1.3.5 Blend Oil
4.1.4 Marketing Strategy

4.2 COFCO
4.2.1 Profile
4.2.2 Key Crushing Plants
4.2.2.1 COFCO Eastocean Oil & Grains Industries (Zhangjiagang) Co., Ltd.
4.2.2.2 COFCO Yellowsea Oils & Grains Industries (Shandong) Co., Ltd.
4.2.2.3 COFCO Eastbay Oils & Grains Industries (Guangzhou) Co., Ltd.
4.2.2.4 COFCO Northsea Oils & Grains Industries (Tianjin) Co., Ltd.
4.2.2.5 Great Ocean Oil & Grain. Industries (Fang Cheng. Gang) Co., Ltd.
4.2.2.6 COFCO ADM Oils & Grains Industries (Heze) Co., Ltd.
4.2.3 Segmentations Strategy
4.2.3.1 Blend Oil
4.2.3.2 Corn Oil & Sesame Oil
4.2.4 Regional Development Strategy
4.2.5 Marketing Strategy
4.2.6 Industrial Integration
4.3 Shandong Luhua Group Co., Ltd.
4.3.1 Profile
4.3.2 Development Strategy of Peanut Oil
4.4 Shandong Xiwang Group Co., Ltd.
4.5 Dongling Grain & Oil Co., Ltd.
4.6 Hunan Jinjian Cereals Industry Co., Ltd.
4.7 Sanhe Hopefull Grain & Oil Foods Co., Ltd.
4.8 China Corn Oil Co., Ltd.
4.9 Heilongjiang Jiusan Oil & Fat Co., Ltd.
4.10 Chinatex Grains and Oils Imp. & Exp. Co., Ltd.
4.11 Shanghai Standard Foods Co., Ltd
4.12 Shanghai Liangyou Haishi Oils & Fats Industry Co., Ltd
4.13 Chongqing Red Dragonfly Oils Co., Ltd.
4.14 Tianjin Julong Group
4.15 Lam Soon Hong Kong Group
4.16 Qiao Jian Group Co., Ltd.
4.17 Others
4.17.1 Shandong Yuhuang Grain and Oil Food Co., Ltd.
4.17.2 Hong Bao Lai Group Co., Ltd.
4.17.3 Nantong Baogang Oils And Fats Development Co., Ltd.
4.17.4 Xiamen Zhongsheng Oil & Grains Group Co., Ltd.
4.17.5 Xinjiang Bole Xinsai Oil & Fat Co., Ltd.
4.17.6 Shandong Longda Foodstuff Group Co., Ltd.

5. Development Tendency of Edible Oil Industry in China
5.1 Diverse Distribution Channels
5.2 Improvement of Industrial Chain
5.3 Development of Healthy Edible Oil

Selected Charts

- Varieties and Features of Edible Oil in China
- Operating Income and Total Profit of Edible Vegetable Oil Processing Industry in China, 2006-2010
- YoY Growth Rate of Edible Vegetable Oil Enterprises in China, 2006-2010
- Varieties, Brands, and Capacities of Edible Oil in China
- Enterprises with Daily Crushing Capacities over Kiloton, 2009
- Output of Edible Oil in China, 2008-2010
- Consumption Ratio of Key Varieties of Edible Oil in China, 2009-2010
- Global Price of Palm Oil, 2009-Feb. 2011
- Wholesale Price Index of Soybean Oil in China, 2009-Feb. 2011
- Wholesale Price Index of Rapeseed Oil in China, 2009-Feb. 2011
- Wholesale Price Index of Peanut Oil in China, 2009-Feb. 2011
- Chinese Grain and Oil Enterprises with Foreign Capital
- Flow Chart of Soybean Processing
- Consumption Volume of Soybean Oil in China, 2007-2010
- Soybean Imported Ratio of Key Grain and Oil Enterprises in China, 2009
- Import and Export Volume of Soybean Oil in China, 2007-Jan. 2011
- Export Volume and Value of Peanut Oil in China, 2008-Jan. 2011
- Import Volume and Value of Peanut Oil in China, 2008-Jan. 2011
- Output and Consumption Volume of Rapeseed Oil in China, 2007-2010
- Supply and Demand of Rapeseed in China, 2007-2011
- Import and Export Volume of Rapeseed Oil in China, 2008-2010
- Key Brands and Sales Area of Corn Oil
- Import Volume and Value of Olive Oil in China, 2008- 2011
- Import Volume and Value of Palm Oil in China, 2007- 2011
- Consumption Volume of Palm Oil in China, 2007-2010

Selected Charts

- Brands of Yihai Kerry
- Operating Income and Gross Margin of Shandong Xiwang Group Co., Ltd., 2008-2010
- Operating Income and Gross Margin of Shandong Xiwang Group Co., Ltd.(by Product), 2010
- Capacity Distribution of Shandong Xiwang Group Co., Ltd.,
- Operating Income and Net Income of Dongling Grain & Oil Co., Ltd., 2008-2010
- Operating Income and Gross Margin of Dongling Grain & Oil Co., Ltd. (by Product), Jan.2010-Jun. 2010
- Operating Income and Net Incomet of Hunan Jinjian Cereals Industry Co., Ltd., 2008-2010
- Operating Income and Gross Margin of Hunan Jinjian Cereals Industry Co., Ltd.(by Business), 2010
- Operating Income and Gross Margin of China Corn Oil Co., Ltd.(by Product), 2010
- Operating Income Ratio of China Corn Oil Co., Ltd.(by Product), 2010
- New Distribution Channel Development of Key Grains and Oils Enterprises

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