This report

◆ Analyzes the operation, export & import, consumption characteristics, brand structure and marketing channel of China grape wine industry.

◆ Focuses on the regional market of China grape wine industry.

◆ Highlights the operation of key enterprises in China.

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Abstract

Benefiting from the rapid progress of the consumption market, the output of grape wine in China has been on the rise year by year. It totaled 1.089 million kiloliters in 2010, up 13.4% YoY. On a provincial basis, Shandong enjoyed the lion's share of 34.4% by 0.375 million kiloliters.

The huge potentiality of Chinese grape wine market has attracted foreign brands, with the proportion of imported grape wines rising from 15.1% in 2009 to 20.6% in 2010. The import origins mainly consist of such famous production areas as France and Australia. Bottled wines are mostly from France and Australia, occupying respectively 46.3% and 16.2% of the total import volume of bottled wines; bulk ones mainly from Chile, Spain, and Australia, with the respective proportion of 32.9%, 27.5%, and 23.8% of the total import volume of barreled wines.

China’s high-end grape wine market features robust demand, so the overseas high-end grape wine brands have successively tapped into Chinese market by means of joint venture, cooperation, agents, etc. Yet the pioneer foreign brands like Custer have transferred to self-management model from the complete reliance on Chinese agents.
Exposed to the impact from overseas grape wine brands, the local magnates including Changyu, Greatwall, and Dynasty have learned from the foreign chateaus and increased the input in high-end grape wines so as to maintain the leading positions within the industry.

Changyu takes the lead in cooperation with overseas brands for chateau construction. The company has raised its overall gross margin via the proportion increase of such high-grade products as Century-old Cellar and Chateau Wine. In Q1 2011, Changyu acquired the gross margin of 74.01%, up 4 percentage points year on year; and the top-grade series contributed 25%-28% to its revenue. Along with the operation of three big chateaus (Xinjiang, Ningxia, and Xi’an) in west region, the high-grade grape wine capacity of Changyu will break through 10 kilotons in 2012.

Greatwall, the grape wine enterprise under COFCO, boasts powerful capitals. In 2011, it started building grape wine production area in Ningxia after Shacheng, Yantai, and Changli; meanwhile, it has practiced the M&A of overseas famous chateaus in order to open the international market. It acquired Bisquertt Vineyard in 2010.

Fueled by the rising industry, some medium-sized wine enterprises have also vigorously developed wine business. In 2010, CITIC Guoan Wine divested itself of the capital loss and focused on the main business of wines. In Q1 2011, its revenue substantially climbed 73.57%. China Tontine Wines Group plans to complete the chateau in 2011 and officially launch the chateau wine in H1 2012. Tonhwa Winery has projected the assets reorganization with the parent company of Yunnan Red and will implement the trans-regional collaboration for complementary advantages in grape wine sector.
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