



**China Cold Chain Logistics Industry Report,  
2011-2012**

**Nov. 2011**

## ***This report***

- ◆ **Analyzes the development of China cold chain logistics industry .**
- ◆ **Focuses on demand for cold chain logistics in China and cold storage.**
- ◆ **Highlights the Refrigerated Vehicle Industry and cold chain logistics companies in China.**

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## Abstract

Following the release of the Development Plan for Cold Chain Logistics of Agricultural Products in 2010, Chinese provinces and municipalities have successively introduced their respective Five-Year (2011-2015) plans for cold chain logistics. For example, Beijing plans to increase the cold chain circulation rates of fruits & vegetables, aquatic products, and meat products from the current 10%, 30% and 50% to 20%, 45% and 70% respectively during 2011-2015. Chongqing plans to enhance the cold chain circulation rates of fruits & vegetables, meat products and aquatic products to 20%, 30% and 37% or above, increase the refrigerated transport rates of such products to about 46%, 52% and 65%, and lower the circulation decay & loss rates of such products to 15%, 8.5%, 10% or less by the end of 2015.

As of the end of 2010, China's total cold storage capacity reached 62 million m<sup>3</sup>. Although there have been many new cold storages built up in China since 2010, the total capacity is similar to the 2009 level, because of factors such as statistical conversion and removal of old storages. Currently, from the perspective of investment structure, among the existing cold storages in China, 21.3% of which are state-owned or state-controlled, 70.5% of which are private-owned or private-controlled, and only 7.8% of which are controlled by foreign capital or foreign side of joint ventures.

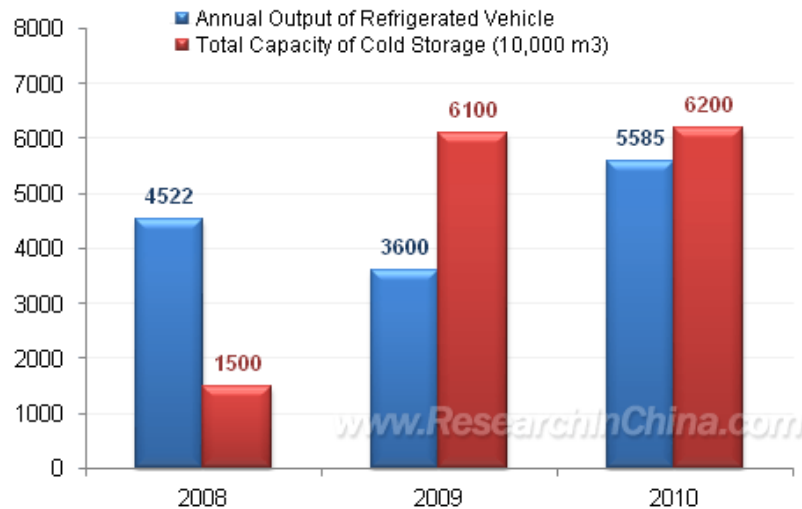
In 2010, the top three enterprises by cold storage capacity were Henan Zhongpin Fresh Food Logistics Co., Ltd. (770,000 m<sup>3</sup>), Wuhan Wandun Cold Storage Logistics Co., Ltd. (760,000 m<sup>3</sup>) and Shandong Gaishi Agricultural Trade Co., Ltd. (750,000 m<sup>3</sup>).

In 2010, the annual output of refrigerated vehicle was 5,585 in China, up 55.1% over the same period in 2009. At present, there are more than 50,000 refrigerated and insulated truck in China, but their proportion in the total number of freight vehicles is still small, which has been around 0.3% in recent years, significantly lower than the level in developed countries.

In 2010, top three enterprises by output of refrigerated vehicle were Beiqi Foton Motor Co., Ltd., Zhenjiang Speed Automobile Group Co., Ltd. and China International Marine Containers (Group) Ltd. (CIMC).

In addition to a research on the refrigerated vehicle and cold storage enterprises closely related to the cold chain logistics industry, this report makes an in-depth analysis of the operation, development strategy and cold chain logistics plan of cold chain logistics operators.

## Annual Output of Refrigerated Vehicle and Total Capacity of Cold Storage in China, 2008-2010



Source: ResearchInChina

**Shanghai Jin Jiang International Industrial Investment Co., Ltd.:** In the first half of 2011, its low-temperature logistics business achieved operating revenue of RMB 47.27 million, up 21.77% year on year. Currently, the company has low-temperature storages in Wujing and Wusong, with total capacity of 85,000 tons, accounting for about 20% of the total low-temperature storage capacity in Shanghai. According to the company's development plan for 2011-2015, it plans to acquire stake in Shanghai Xintiantian Dazhong Cold Logistics Co., Ltd. to enhance its distribution function.

**China Railway Tielong Container Logistics Co., Ltd.:** In the first three quarters of 2011, it achieved operating revenue of RMB 2.145 billion, up 29.75% year on year; Currently, the 2,500 special containers newly built in 2011 have basically been put into operation, making the company's ownership of special container reach 29,000 units so far. Moreover, the company's container building plan for 2011-2013 includes an addition of 400 refrigerated containers, and it plans to develop the refrigerated container business relying on large clients, which currently include Yili, Mengniu, Sanquan and Wanchai Ferry.

**Shanghai Haibo Co., Ltd.:** In the first half of 2011, the company's transportation business achieved operating revenue of RMB 456.78 million, up 9.3% year on year. In addition to replacing existing four old cold storages since 2010, the company plans to buy land to build standard cold storage in Qingpu, aiming to expand the cold chain distribution business based on cold storage.

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