



**China Snack Food Industry Report,
2010-2013**

Dec. 2011

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and understand the size and growth rate of any opportunity.

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study.

Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include NBS(National Bureau of Statistics of China), China Customs, Wind, and China National Food Industry Association etc.

Abstract

2005-2010, the snack food industry of China presented a CAGR of 16.9% for sales, with the revenue in 2010 hitting RMB503.57 billion. As the residents' demand increases, the earnings from Chinese snack food industry between 2011 and 2013 is expected to grow at a rate of around 17%.

China snack food industry involves seven sub-sectors. By operating revenue, biscuit and other baked food sector ranks the highest, with the revenue in 2010 soaring 44.6% year-on-year to RMB80.7 billion; while the roasted seeds and nuts sector makes revenue RMB37.3 billion, less than other sectors, but it is expected to see substantial prospect. In the future, the robust demand for roasted seeds and nuts products in small- and medium-sized cities and villages will be new growth engine and it will grow at a rate of roughly 16% during 2011-2013.

Operating Revenue, Profit and Company Number of China Snack Food Industry Segments, 2010

No.	Industry Segment	Operating Revenue (RMB bn)	Total Profit (RMB bn)	Number of Companies
1	Biscuit & Other Baked Food	80.7	5.4	854
2	Canned Vegetable & Fruit	56.6	1.8	720
3	Candy & Chocolate	51.9	6	437
4	Cake & Bread	37.8	3	725
5	Roasted Seeds & Nuts	37.4	---	---
6	Preserved Fruit	16.8	0.9	409
7	Canned Meat and Poultry	11.9	0.4	99

Source: ResearchInChina

Compared to the stable development of biscuit and roasted seeds & nuts industries, candy & chocolate industry has seen unrest in development, presenting dramatic change in market pattern.

In February 2010, Kraft took over Britain-based candy tycoon Cadbury following its acquisition on Danone's biscuit business in July 2007. Afterwards, Kraft launched varieties of new products in China through Cadbury's production lines, in a bid to seize more market occupancy of candy products.

On December 6th, 2011, Nestle gained approval to take over 60% stake of Hsu Fu Chi International Ltd, marking the second acquisition move for the company to buy local food company shortly after being approved to take over 60% stake of Xiamen-based Yinlu in September. Hsu Fu Chi International Ltd is mainly engaged in the production of candies, sachima, etc, with the operating revenue and net income hitting RMB4.31 billion and RMB600 million in 2010, a respective YoY rise of 14% and 31%. And the market occupancy of Hsu Fu Chi International Ltd in China realizes 6.6%, ranking the first place. The acquisition will help Nestle greatly enhance its strength to compete with Kraft in the candy market of China.

The report conducted by ResearchInChina highlights the followings:

- ④ Development environment, industry scale and development tendency of China snack food industry;
- ④ Development, operating revenue and profit of China snack food industry and industry segments;
- ④ Development of nine key companies in China snack food industry, including overall operation, capacity, output and development strategy;
- ④ Forecast of snack food industry segments, development prospects of key players, overall development tendency of the industry to 2013

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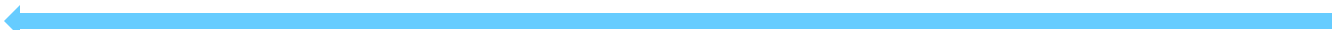
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