China Paddy and Rice Processing Industry Report, 2011-2012

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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

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 China Fermentation Industry Association, Food and Agriculture Organization, and China Custom etc..

Abstract

The paddy and rice processing industry is an emerging industry. Rice resources can be sufficiently utilized and rice value can be raised by around 75% through deep processing. Based on different positions in industrial chain, paddy and rice processing enterprises can be classified into five operating modes: edible rice and rice bran oil serve as leading products in the first mode; the production of edible rice and rice products plays a dominant role in the second mode; enterprises in the third mode are engaged in the deep processing of rice, and are involved in the market of nutrition and healthcare products; in the fourth mode, crushed rice is taken as raw materials to produce rice starch sugar and rice protein; and enterprises in the fifth mode run through the whole industry chain, and adopt a cycling economic production mode in which byproducts can be utilized efficiently and comprehensively.

Major Paddy and Rice Processing Enterprises and Their Products in China

Enterprise type	Representative enterprises	Common rice	Polished rice	Rice starch sugar	Rice albumen powder	Rice protein	Rice bran oil	Rice bran dregs and other feed	Power generation from rice husk and related applications	Remark
1	Yihai Kerry Group									They just entered the industry in recent years, relying on their edible oil brands & channels, and emphasizing rice quality.
	COFCO Rice Division									
2	Heilongjiang Beidahuang Rice Industry Group Co., Ltd.									They grew up as local rice brands, with rice gross margin below 10%.
	Hunan Jinjian Cereals Industry Co., Ltd.									
3	Shanghai Rong Xuan Hang Commercial Trade Co., Ltd.									It extracts rice protein from rice albumen powder for use in the processing of healthcare food.
4	Guangzhou Shuangqiao Co., Ltd.									They buy crushed rice to produce starch sugar and albumen powder.
	Wuhan Jiabao Sugar Co., Ltd.									
5	Jiangxi Jinjia Grains Co., Ltd.									They buy rice and crushed rice, and have industrial chains & branded small packing products.
	Wanfu Biotechnology (Hunan) Agricultural Development Co., Ltd.									

Note: major businesses are colored in dark green, and involved businesses are colored in light green

Source: ResearchInChina 《China Paddy and Rice Processing Industry Report, 2011-2012》

China's paddy and rice processing enterprises vary in profitability due to different operating modes and products. Enterprises in the fifth mode represented by Wanfu Biotechnology feature higher profitability since their rice resources are developed comprehensively and utilized sufficiently, and their products are involved in the whole industry chain. From January to September of 2011, Wanfu Biotechnology's operating revenue and net income were RMB396 million and RMB51.09 million respectively, increasing 25.7% and 37.6% separately year on year. In 2011, the company went public to raise funds in order to expand its production capacity of major products. Its production capacity is expected to be doubled after the capacity expansion project being put into production.

In consideration of Wanfu Biotechnology's first-mover advantage, enterprises represented by Yihai Kerry Group and COFCO Rice Division depend on their scale advantage as well as existing brands and channels to set foot in the paddy and rice processing industry. Such enterprises are dominant producers of small packing polished rice, while the sales volume of small packing polished rice accounts for less than 10% of the rice consumption in China at present. As people pay more and more attention to the nutritional and healthcare function of rice, these enterprises will see a promising market development prospect. However, Beidahuang and Jinjian, also being producers of small packing polished rice, have relatively low profitability due to regional and production scale restrictions.

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Representative enterprises in the third mode and the fourth mode, such as Shanghai Rong Xuan Hang and Wuhan Jiabao, only focus on the development of rice albumen powder, rice starch sugar and the like in the industry chain. In spite of small number of product categories, they also see huge development potential owing to relatively higher technical barriers and prosperous market demand. Taking rice starch sugar product as an example, it is gradually replacing cane sugar featured with insufficient quantity and high price due to its low cost and sufficient raw materials; and its output is expected to reach 1.7 million tons in 2013 in China, and its proportion in the total output of starch sugar will rise to 14.2% from 12.8% in 2006.

China Paddy and Rice Processing Industry Report, 2011-2012 by ResearchInChina mainly covers the followings:

✓Development environment, industry scale and development trend of paddy and rice processing industry in China

✓Supply and demand of upstream raw materials and downstream deep processing products in Chinese paddy and rice processing industry

✓Major operating modes of paddy and rice processing enterprises in China and development of representative enterprises, comprising overall operation, production capacity, output and development strategies, etc.

✓Forecast of the development trend of paddy & rice processing companies and the whole Chinese paddy and rice processing industry .

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