



China Sugar Industry Report, 2012-2014

Oct. 2012

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

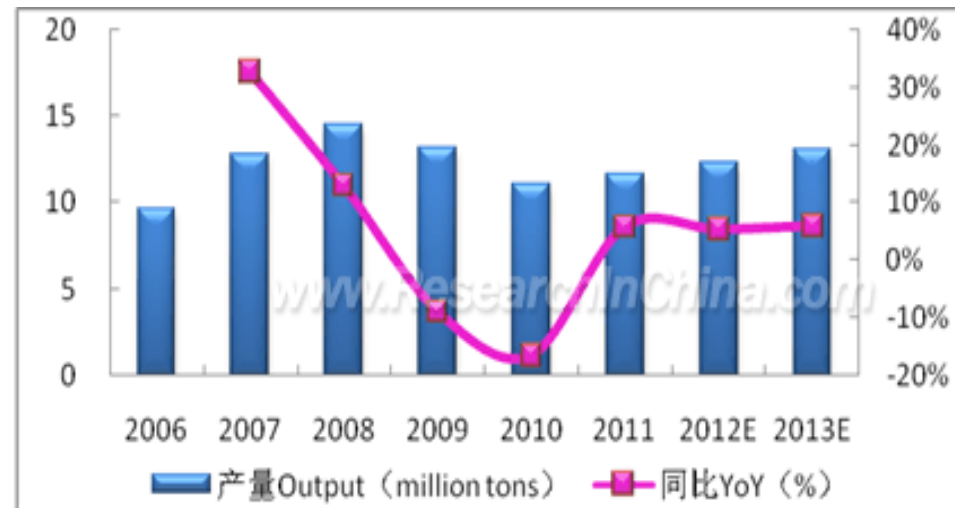
The primary information sources include National Bureau of Statistics of China, China Customs, and United States Department of Agriculture etc.

Abstract

The sugar industry takes sugarcane and sugar beet as raw materials to manufacture finished sugar products which find application in food & beverage sectors. In 2011, the global sugar output amounted to 160 million tons and was mainly distributed in Brazil, India, the European Union and China. Brazil, the world's largest sugar producer and exporter, boasted 23.8% of the global sugar output in 2011.

As one of the major producers and consumers of sugar, China ranked the global No. 3 and No. 2 in sugar output and consumption respectively in 2011. Sugarcane serves as principal raw material for sugar production and contributes more than 90% to the sugar output. In 2011, the output of China's sugar grew by 5.8% YoY to 11.7 million tons. The main producing areas of sugar are Guangxi, Yunnan and Guangdong which together account for about 85% of the country's total output.

Output and YoY Growth Rate of Sugar in China, 2006-2013E



Source: National Bureau of Statistics of China; ResearchInChina
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With respect to sugar consumption, the rising living standards of Chinese residents and the rapid progress of sugar-consuming industries such as food and beverage sectors have empowered the sugar consumption in China to stay at approximately 14 million tons in recent years. In 2011, the apparent consumption of sugar in China got to 14.6 million tons; due to the fact that the sugar output failed to meet the demand, China imported 2.9 million tons of sugar, up 65.3% year-on-year.

The leading sugar manufacturers in China include Nanning Sugar Industry Co., Ltd., Guangxi Guitang (Group) Co., Ltd. and COFCO Tunhe Co., Ltd., etc. In 2011-2012, as increased purchasing costs of sugarcane and falling sugar price shrank profit margins of the enterprises, the majority of sugar producers suffered a declining profit. Taking Nanning Sugar Industry for example, the revenue of the company rose by 9.0% YoY to RMB4.22 billion, and its net income plummeted by 73.5% YoY to RMB45.4 million in 2011. Later in H1 2012, the company made a loss of RMB44.1 million.

The report resolves around the followings:

- Supply & demand of global sugar industry, output, imports & exports of major sugar producing countries;
- Policies, market size, supply and demand, price trend, imports and exports of Chinese sugar industry;
- Sown area, output and price trend of upstream sugarcane and sugar beet in China;
- Demand from downstream beverage, candy, pastry and dairy products sectors;
- Operation, subsidiaries, sugar business and development of 11 sugar manufacturers in China.

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