



# China Cold Chain Logistics Industry Report, 2013

July 2013

## 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 Company Reports, and National Bureau of Statistics of China etc.

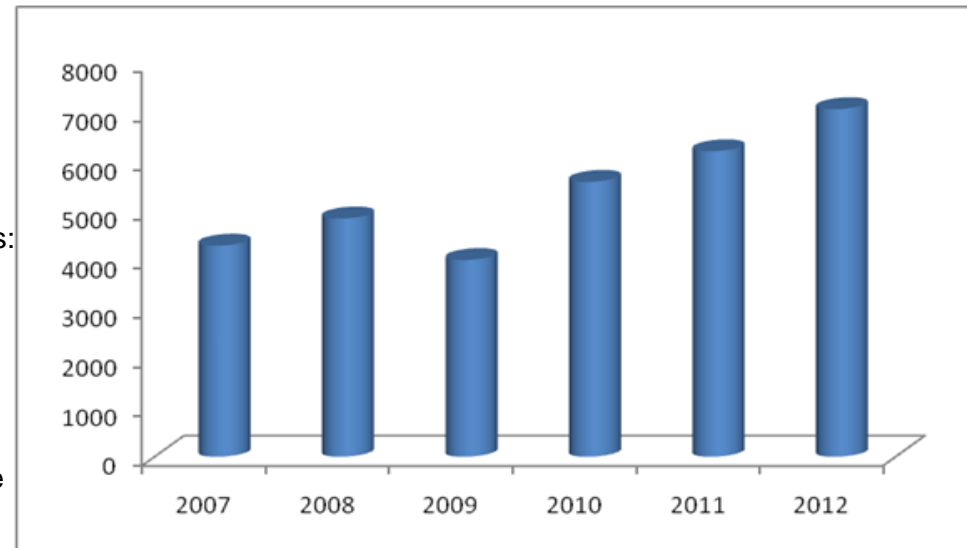
## Abstract

The 12th Five-Year Planning concerning cold chain logistics was issued in 2011 following the release of Farm Produce Cold Chain Logistics Development Planning by National Development and Reform Commission (NDRC) in 2010. Thanks to these plannings, China cold chain logistics industry has seen exceedingly rapid development in recent years.

In 2012-2013, the development of cold chain logistics industry features:

1. Driven by preferential policies and soaring market demand, China's demand for refrigerated vehicles saw an upward mobility year by year, with the output of heat preservation vehicles growing by 10% in 2005-2010 up to 13.8% in 2011-2012. In 2012, the heat preservation vehicle output in China hit 7,063. In particular, major heat preservation vehicle producers including FOTON, ZHENJIANG SPEED AUTOMOBILE CO., and CIMC all enjoyed the market share of at least 10%.

**Output of Refrigerated Vehicle and Heat Preservation Vehicle in China, 2007-2012**



Source: China Automotive Technology & Research Center, Institute of Automobile Industry Development  
[researchinchina.com](http://researchinchina.com) China Cold Chain Logistics Industry Report, 2013

2. The cold storage presents unreasonable structure despite constant rapid progress. As of late 2012, the statistics showed that the gross volume of cold storage in China surged by roughly 20% year-on-year to 85.35 million sq meters, of which, congelation cold storage (including ice store)'s volume registered 55.02 million cubic meters, refrigerant cold storage (including air-conditioned cold store) 30.15 million cubic meters and ultra-low temperature freezer 180,000 cubic meters. In terms of cold storage construction, the nationwide top three comes to Henan Zhongpin Fresh Food Logistics Co., Ltd., Wuhan Wandun Cold Storage Logistics Co., Ltd. and Shandong Gaishi Agricultural Trade.

By type, the congelation cold storage occupies 60% of the total, while ultra-low temperature freezer accounts for less than 1%. Meanwhile, more than 60% cold storage concentrates in East China but Central and West China.

### **The report highlights the followings:**

- Overview of China Cold Chain Logistics Industry: development history, laws and regulations, market scale, status quo and outlook of the industry in major regions and nationwide;
- Main application fields of China cold chain logistics industry: vegetables and fruits, dairy products, aquatic products, meat, frozen rice& flour, and bio-pharmaceutical market scale and the demand for cold chain in market segments;
- Market scale, status quo, and development trend of refrigerating and heat preservation vehicle in China cold chain logistics industry chain;
- Top ten heat preservation vehicle producers including Beiqi Foton Motor Co., Ltd, Zhenjiang Speed Automobile Group Co., Ltd., Zhengzhou Hongyu Special Vehicle Co., Ltd, China International Marine Containers (Group) Co., Ltd, Henan Hikuma Vehicle Manufacturing Co., Ltd, Henan Xinfei Special Purpose Vehicle Co., Ltd., Zhenjiang Kangfei Machine Building Co., Ltd., New-Line Machine & Electricity Equipment, JAC, Dongfeng Holdings;
- two major refrigerator vendors: Yantai Moon Co., Ltd., Dalian Bingshan Group Refrigeration Equipment;
- top 10 operators including Henan Zhongpin Fresh Food Logistics Co., Ltd., Wuhan Wandun Cold Storage Logistics Co., Ltd., Shandong Gaishi Agricultural Trade, Jinjiang International Industrial Investment Co., Ltd; 12 cold chain operators of Sinotrans including Shanghai Haibo, Jinjiang International Industrial Investment Co., Ltd, China Railway Tielong Container Logistics ,Shandong Ronkin Group, Sinotrans, Chengdu Silver Plow Low-Temperature Logistics, China Merchants Americold, Shanghai Jiao Rong Cold Chain Logistics Co., Ltd;

### 1. Introduction to Cold Chain Logistics Industry in China

- 1.1 Definition
- 1.2 Features

### 2. Development of Cold Chain Logistics Industry in China

- 2.1 Policy Environment
- 2.2 Development Overview
- 2.3 Third-party Cold Chain Logistics

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- 8.9 Jianghuai Automobile Co., Ltd. (JAC)
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- Main and Professional Refrigerator Vehicles of Sinosun
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