



China Sugar Industry Report, 2013-2015

Aug. 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.

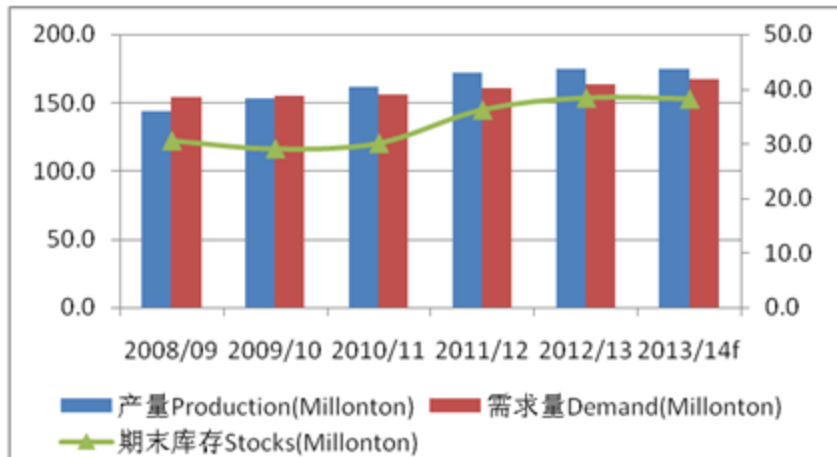
INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

From 2008/09 to 2013/14, the global supply of sugar has undergone changes from short supply to excess supply: raw sugar production increased from 140 million tons in 2008/09 to 170 million tons in 2012/13; while the demand for raw sugar was basically stabilized at about 150 million tons. It is expected that in 2013/14 global production of raw sugar may reach 174.9 million tons, with consumption to be 167.3 million tons, the global raw sugar industry continues to face destocking pressure.

Global Raw Sugar Production, Demand and Stocks, 2008/09-2013/14



Source: USDA, ResearchInChina China Sugar Industry Report, 2013-2015

As the world's significant producing and importing country of sugar, China's sugar output in 2012/13 climbed 13.5% YoY to 13.068 million tons, of which, Guangxi was the largest sugar producing area, with sugar production accounting for 63.7% of the total; followed by Yunnan (14.7%) and Guangdong (8.4%). In 2012, China imported 3.747 million tons of table sugar, hitting a record high.

Since 2012, despite the sustainable growth in downstream demand, sugar enterprises affected by falling prices of table sugar and rising production costs have witnessed increase of loss. From January to June 2013, among 296 domestic sugar enterprises above designated size, as many as 55.1% of them suffered losses, listed companies such as Guangxi Yangpu Nanhua Sugar Industry Group Co., Ltd. and Guangxi Guitang (Group) Co., Ltd. still faced destocking pressures, the sugar business would continue to face adverse conditions.

China Sugar Industry Report, 2013-2015 mainly covers the followings:

- Development status, market supply and demand, import and export trade, price trend, etc. of global sugar industry;
- Development status, market supply and demand, import and export trade, price trend, development prospect, etc. of sugar industry in China;
- Development status, import and export trade, development prospect, etc. of downstream industries and rival commodities industries of sugar industry in China;
- Operating status, investment and M&A, business analysis, development forecast, etc. of 11 major sugar companies in China.

1. Sugar Related Concepts

- 1.1 Sugar Related Concepts
- 1.2 Sugar Industry Chain

2. Development of Global Sugar Industry

- 2.1 Global Sugar Crop Production
 - 2.1.1 Sugarcane
 - 2.1.2 Beet
- 2.2 Global Raw Sugar Production
 - 2.2.1 Supply & Demand
 - 2.2.2 Supply Structure
 - 2.2.3 International Trade
 - 2.2.4 Sugar Price Trend
- 2.3 Major Countries
 - 2.3.1 Brazil
 - 2.3.2 India
 - 2.3.3 Thailand
 - 2.3.4 Australia
 - 2.3.5 EU-27
 - 2.3.6 USA
 - 2.3.7 Russia

3. Development of China Sugar Industry

- 3.1 Policy Environment
 - 3.1.1 12th Five-Year Development Plan for Sugar Industry
 - 3.1.2 National Reserve System
 - 3.1.3 Sugar Import Tariff System

- 3.2 Sugar Crop Production
 - 3.2.1 Sugarcane
 - 3.2.2 Beet
- 3.3 Overview of Table Sugar Production
 - 3.3.1 Table Sugar Production
 - 3.3.2 Demand for Raw Sugar
 - 3.3.3 Import & Export
 - 3.3.4 Price Trend
- 3.4 Sugar Enterprises

4. Downstream Industry & Alternatives Industry

- 4.1 Downstream Industry
 - 4.1.1 Beverage
 - 4.1.2 Confectionery
 - 4.1.3 Pastry
 - 4.1.4 Dairy
- 4.2 Alternatives Industry
 - 4.2.1 Starch Sugar
 - 4.2.2 Xylitol

5. Key Companies

- 5.1 Nanning Sugar Industry Co., Ltd.
 - 5.1.1 Profile
 - 5.1.2 Operation
 - 5.1.3 Revenue Structure
 - 5.1.4 Gross Margin
 - 5.1.5 Clients
 - 5.1.6 Sugar Business

- 5.1.7 Prospect & Outlook

5.2 Guangxi Guitang (Group) Co., Ltd.

- 5.2.1 Profile
- 5.2.2 Operation
- 5.2.3 Revenue Structure
- 5.2.4 Gross Margin
- 5.2.5 Clients
- 5.2.6 Sugar Business
- 5.2.7 Prospect & Outlook

5.3 COFCO Tunhe

- 5.3.1 Profile
- 5.3.2 Operation
- 5.3.3 Revenue Structure
- 5.3.4 Gross Margin
- 5.3.5 Clients
- 5.3.6 Sugar Business
- 5.3.7 Prospect & Outlook

5.4 Baotou Huazi Industrial Co., Ltd.

- 5.5 Xinjiang Guannong Fruit & Antler Group Co., Ltd
- 5.6 Guangxi Yangpu Nanhua Sugar Industry Group Co., Ltd.

5.7 Dongtang Group

- 5.8 GuangXi State Farms Sugar Industrial Group Company Limited
- 5.9 Yunnan Yinmore Sugar Group Company Ltd.
- 5.10 Botian Sugar
- 5.11 Guangdong Hengfu Sugar Industry Group Co., Ltd.

- Sugar Industry Chain
- Global Sugarcane Output, 2006-2012
- Global Sugarcane Output Structure by Continent, 2006-2012
- American Sugarcane Output Structure by Region, 2006-2012
- Asian Sugarcane Output Structure by Region, 2006-2012
- World's Top 10 Sugarcane Producing Countries and Proportion, 2010-2012
- Global Beet Output, 2006-2012
- Global Beet Output Structure by Continent, 2006-2012
- European Beet Output Structure by Region, 2006-2012
- Asian Beet Output Structure by Region, 2006-2012
- American Beet Output Structure by Region, 2006-2012
- World's Top 10 Beet Producing Countries and Proportion, 2010-2012
- Global Raw Sugar Production, Demand and Stocks, 2008/09-2013/14
- Global Sugarcane and Beet Sugar Output Structure, 1970s-2000s
- Global Beet Sugar and Sugarcane Output Structure, 2005-2013
- Global Raw Sugar Trade Volume, 2008/09-2013/14
- Monthly Average Price for ICE Raw Sugar Dominant Contracts, 2010-2013
- Monthly Average Price for LIFFE Granulated Sugar Dominant Contracts, 2010-2013
- Brazil's Raw Sugar Output and Export Volume, 2008/09-2012/13
- Distribution of Raw Sugar Production in Brazil, 2012/13
- Raw Sugar Output Structure in Central and Southern Brazil by State, 2012/13
- India's Raw Sugar Output, Import and Export Volume, 2008/09-2012/13
- India's Sugarcane Acreage Structure by State, 2012/13
- Thailand's Raw Sugar Output and Export Volume, 2008/09-2012/13
- Australia's Raw Sugar Output and Export Volume, 2008/09-2012/13

- EU-27's Raw Sugar Output, Import and Export Volume, 2008/09-2012/13
- U.S. Raw Sugar Output and Import Volume, 2008/09-2012/13
- U.S. Sugarcane and Beet Sugar Output Structure, 2007/08-2013/14
- U.S. Sugar Import Structure, FY2008-FY2013
- Russia's Raw Sugar Output and Import Volume, 2008/09-2012/13
- China's Sugarcane and Beet Acreage Structure, 2006-2012
- China's Sugarcane Acreage and YoY Growth Rate, 2003-2011
- China's Sugarcane Acreage Structure by Main Producing Area, 2012
- China's Beet Acreage and YoY Growth Rate, 2003-2011
- China's Beet Acreage Structure by Main Producing Area, 2012
- China's Sugar Output and YoY Growth Rate, 2006/07-2012/13
- China's Table Sugar Output Structure by Main Producing Area, 2012/13
- China's Sugarcane and Beet Sugar Output Structure, 2005/06-2012/13
- China's Sugarcane and Beet Sugar Output, 2005/06-2012/13
- China's Demand for Raw Sugar, 2008/09-2012/13
- China's Table Sugar Import and Export Volume, 2005-2013
- Proportion of China's Major Table Sugar Importing Countries, Jan.-Jun. 2013
- CSA (China Sugar Association) Integrated Sugar Price Charts, 2001-2013
- Number of Sugar Enterprises in China, 1999-2013
- Proportion of Loss-Making Enterprises in China Sugar Industry, 1999-2013
- Number of Beverage Producers in China, 2001-2013
- China's Soft Drinks Output and YoY Growth, 2006-2013
- Number of Candy, Chocolate, Candied Fruit Producers in China, 2001-2013
- China's Candy Output and YoY Growth, 2006-2013
- Number of Pastry Producers in China, 2001-2013

- China's Pastry Output and YoY Growth, 2006-2010
- Number of Dairy Producers in China, 2003-2013
- China's Dairy Output and YoY Growth, 2006-2012
- China's Starch Sugar Output and YoY Growth, 2006-2012
- China's Xylitol Export Volume and YoY Growth Rate, 2009-2013
- Revenue and Net Income of Nanning Sugar Industry, 2008-2013
- Revenue Breakdown of Nanning Sugar Industry by Product, 2008-2013
- Revenue Structure of Nanning Sugar Industry by Product, 2008-2013
- Revenue Breakdown of Nanning Sugar Industry by Region, 2008-2013
- Revenue Structure of Nanning Sugar Industry by Region, 2008-2013
- Gross Margin of Major Products of Nanning Sugar Industry, 2008-2013
- Nanning Sugar Industry's Revenue from Top 5 Clients and % of Total Revenue, 2008-2013
- Name List and Revenue Contribution of Nanning Sugar Industry's Top 5 Clients, 2013
- Revenue and Gross Margin of Machine-made Sugar of Nanning Sugar Industry, 2008-2013
- Machine-made Sugar Output and Sales Volume of Nanning Sugar Industry, 2008-2012
- Revenue and Net Income of Nanning Sugar Industry, 2010-2015E
- Revenue and Net Income of Guangxi Guitang (Group), 2008-2013
- Revenue Breakdown of Guangxi Guitang (Group) by Product, 2010-2012
- Revenue Structure of Guangxi Guitang (Group) by Product, 2010-2012
- Revenue Breakdown of Guangxi Guitang (Group) by Region, 2010-2012
- Revenue Structure of Guangxi Guitang (Group) by Region, 2010-2012
- Gross Margin of Major Products of Guangxi Guitang (Group), 2008-2012
- Guangxi Guitang (Group)'s Revenue from Top 5 Clients and % of Total Revenue, 2009-2012
- Name List and Revenue Contribution of Guangxi Guitang (Group)'s Top 5 Clients, 2012
- Revenue and Gross Margin of Machine-made Sugar of Guangxi Guitang (Group), 2010-2012

- Sugar Output of Guangxi Guitang (Group), 2008-2012
- Revenue and Net Income of Guangxi Guitang (Group), 2010-2015E
- Revenue and Net Income of COFCO Tunhe, 2008-2013
- Revenue Breakdown of COFCO Tunhe by Product, 2010-2012
- Revenue Structure of COFCO Tunhe by Product, 2008-2012
- Revenue Breakdown of COFCO Tunhe by Region, 2008-2012
- Revenue Structure of COFCO Tunhe by Region, 2008-2012
- Gross Margin of Major Products of COFCO Tunhe, 2008-2012
- COFCO Tunhe's Revenue from Top 5 Clients and % of Total Revenue, 2008-2012
- Name List and Revenue Contribution of COFCO Tunhe's Top 5 Clients, 2008-2012
- Revenue and Gross Margin of Sugar Industry of COFCO Tunhe, 2008-2012
- Operation of Sugar Related Subsidiaries of COFCO Tunhe, 2012
- Revenue and Net Income of COFCO Tunhe, 2013-2015E
- Revenue and Net Income of Baotou Huazi Industrial, 2008-2013
- Revenue Breakdown of Baotou Huazi Industrial by Product, 2008-2012
- Revenue Structure of Baotou Huazi Industrial by Product, 2008-2012
- Revenue Breakdown of Baotou Huazi Industrial by Region, 2008-2012
- Revenue Structure of Baotou Huazi Industrial by Region, 2008-2012
- Gross Margin of Sugar Industry of Baotou Huazi Industrial, 2009-2012
- Baotou Huazi Industrial's Revenue from Top 5 Clients and % of Total Revenue, 2008-2013
- Name List and Revenue Contribution of Baotou Huazi Industrial's Top 5 Clients, 2012
- Revenue and Net Income of Xinjiang Guannong Fruit & Antler Group, 2008-2013
- Revenue Breakdown of Xinjiang Guannong Fruit & Antler Group by Product, 2008-2012
- Revenue Structure of Xinjiang Guannong Fruit & Antler Group by Product, 2008-2012
- Revenue Breakdown of Xinjiang Guannong Fruit & Antler Group by Region, 2008-2012

- Revenue Structure of Xinjiang Guannong Fruit & Antler Group by Region, 2008-2012
- Gross Margin of Major Products of Xinjiang Guannong Fruit & Antler Group, 2008-2012
- Xinjiang Guannong Fruit & Antler Group's Revenue from Top 5 Clients and % of Total Revenue, 2008-2012
- Name List and Revenue Contribution of Xinjiang Guannong Fruit & Antler Group's Top 5 Clients, 2012
- Revenue and Gross Margin of Sugar Business of Xinjiang Guannong Fruit & Antler Group, 2008-2012
- Revenue and Net Income of Xinjiang Guannong Fruit & Antler Group, 2010-2015E
- Sugar Production of Major Subsidiaries of Guangxi Yangpu Nanhua Sugar Industry Group, 2011
- Fund-raising Projects of Guangxi Yangpu Nanhua Sugar Industry Group, 2012
- Sales and Profit of Yunnan Yinmore Sugar Group, 2010-2011
- Sugarcane Squeezing Amount and Sugar Output of Yunnan Yinmore Sugar Group, 2009/10-2012/13
- Capacity of Major Sugar Factories Subordinate to Yunnan Yinmore Sugar Group

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