



China Condiment Industry Report, 2013-2015

Jan. 2014

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

Being optimistic about the prospect of Chinese condiment market, Danone, Nestlé, Unilever, Hormel Foods, McCormick and other foreign companies through mergers and acquisitions, direct investment or joint ventures have in succession entered the Chinese condiment market. On January 4, 2013 Hormel Foods acquired Unilever's Skippy? Brand Peanut Butter (including the facilities in Little Rock, Arkansas, USA and Weifang, China) with US\$700 million; on May 31, 2013 McCormick (Wuhan) Food Co., Ltd., a wholly-owned subsidiary of McCormick completed the asset acquisition of Wuhan Yatai Seasoning Food Co., Ltd. with US\$147 million to get the latter's chicken essence brands "DaQiao" and "ChuShiLe", making strong entry into Central China.

Chinese condiment mainly refers to soy sauce, vinegar and similar products, monosodium glutamate (MSG), etc.. In 2008-2012 Chinese condiment industry revenue grew at a CAGR of 17%, of which, soy sauce and vinegar sector as the main driving force grew at a CAGR of 23%.

In addition, R & D of chrome-free refractories is also the focus of industry development. So far, Ruitai Materials Technology, Zibo Luzhong Refractory, etc. in cement kiln refractories, Qinghua Refractories, Zhejiang Jinlei Refractories, etc. in refractories for AOD furnace, Luoyang Institute of Refractories Research (LIRR), Shangyu Zili Corp New Material Co., Ltd (Zili Corp), etc. in refractories for RH furnace have made many successful attempts, followed by vigorous promotion.

As far as enterprises are concerned, China through mergers and acquisitions has had a few competitive refractory companies such as Qinghua Refractories, Puyang Refractories, Ruitai Materials Technology, Beijing Lier High Temperature Materials, Luoyang Institute of Refractories Research, Shandong Refractories Group.

Chinese chicken essence industry has a high concentration, embracing nearly 20 large-scale producers, with CR5 up to 68% or so. The industry is mainly monopolized by foreign companies such as Switzerland-based Nestlé, the owner of HaoJi and Totole. Local Chinese enterprise - Guangdong Jialong Food Co., Ltd. relying on unique chicken essence recipe, inimitability and price competitiveness has occupied high market share in the middle and top grade catering industry.

Leading Foreign Companies and Brands in China Condiment Market



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