China Grape Wine Industry Report, 2013-2016

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

Abstract

Recent years have seen substantial growth in Chinese grape wine market. From 2001 to 2012, the grape wine output in China had shown an upward trend with the CAGR of 16.5%. However, the 18th CPC National Congress called on the restriction of spending by central government bodies on official overseas visits, official vehicles, and official hospitality, “six bans”, and alcohol prohibition in the military, leading to the slowdown of growth or even decline in China wine market. In 2013, the output and consumption of grape wine in China went down by 4.7% year-on-year and 13.7% year-on-year, respectively.

By region, the consumption in China grape wine market varies a lot in terms of development. For now, China’s southeast coastal regions, including Shanghai, Guangdong, Fujian and Zhejiang where are economically developed, have achieved provincial-level market scale valuing RMB1-3 billion, city-level market scale valuing RMB100 million, and county-level market scale valuing RMB10 million. However, in the north and the vast central and western regions, the grape wine consumption is still at a stage of market incubation, with the exception of such cities as Beijing and Chengdu.

Due to the restriction of weather and geographical conditions, the grape wine production in China demonstrates higher regional concentration. In China, there are just three provinces and municipalities seeing the annual grape wine output of 100 million liters or more. Among these, the largest grape wine producers come to Shandong (the Bohai Bay area) and Jilin (Tonghua), with the combined output in 2013 amounting to 712 million liters or 64% of the national total. In Shandong, Chardonnay, Carbernet Sauvignon, Merlot, and Carignane are major grape wine varieties. Also, planting bases of homegrown wine producers like CHANGYU, Great Wall and Dynasty are located in Shandong.

With China’s accession into the WTO, China’s import tariff on grape wine was reduced from 65% to 14%, bringing a large inrush of foreign grape wines into the Chinese market. In 2012, the grape wine import volume of China reported 394 million liters, equivalent to 2.4 folds of the figure in 2008. In 2013, the Ministry of Commerce launched anti-dumping and anti-subsidy investigations on made-in-EU grape wines. Together with the impact brought by the government call to restrict the spending by the central government bodies on official overseas visits, official vehicles, and official hospitality, China’s total import volume of grape wine witnessed a year-on-year decline of 4.5%. In 2013, China’s import volume of bottled grape wine accounted for 74% of the total, with France as the major import origin.

China grape wine industry is to enter into a stage for structural adjustment after 2013 (for instance, de-stocking targeting wine dealers, wine producers’ orientation to low-and medium-end market), in order to pop the market bubble for a comeback to the right track. It is estimated that the CAGR of grape wine consumption in China between 2013 and 2016 will post 9.7%.

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The report highlights the followings:

※ production scale, import & export, consumption, market price and operation of China grape wine industry;

※ industrial polices, import & export policies, influences from industries upstream and downstream;

※ expectation on the development of global and China grape wine industry: production scale, consumption momentum, competition between homemade wines and imported wines;

※ production, operation, investment and M&As, wine business and development outlook of 10 leading Chinese grape wine enterprises.

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