

**Global and China Sugar Industry  
Report, 2014-2017**

**Sept. 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.

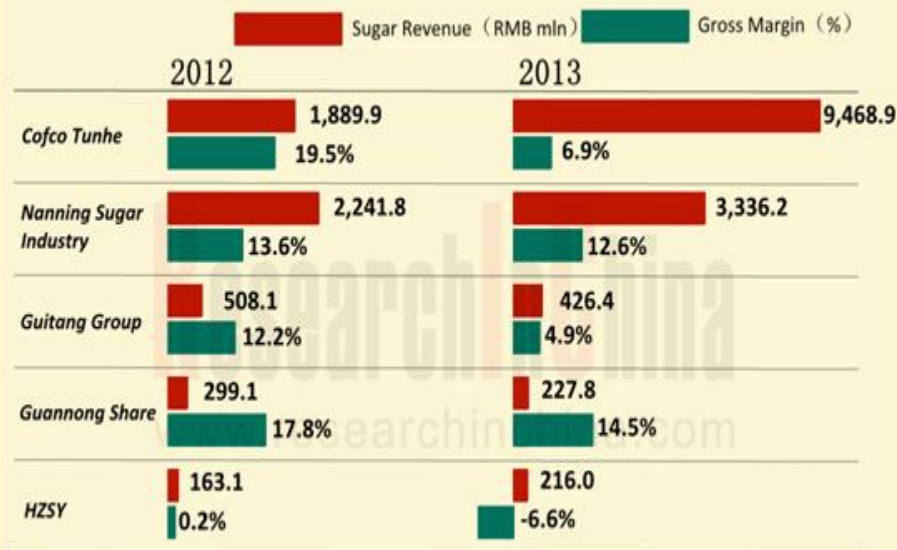
## Abstract

During 2008/09-2012/13, the global raw sugar output presented a CAGR of 5.4% as the market experienced a shift from a short supply to oversupply. In 2013-2014, the output of raw sugar somewhat declined to 175.7 million tons. It is predicted that in 2014/15 the global raw sugar output will continue to fall, and that high inventory of global sugar will thus be very likely to reverse.

As one of the world's important table sugar producers, China saw the sugar output of 13.318 million tons, up 1.9% from a year earlier, ranking the third place around the globe. Cane sugar is the major sugar variety in China, with its output accounting for over 90% of the total sugar output in the country. With larger planting area, Guangxi leads China in table sugar output, with its sugar output for 2013 occupying 64.3% of the national total.

Affected by the laws of sugarcane production, the sugarcane output in China will show a downward trend, which would probably last through 2016/17 season. On the other hand, restricted by the factors like natural environment and industry policies, China's sugar output will grow by a limited margin.

Sugar Revenue and Gross Margin of Listed Sugar Enterprises in China, 2012-2013



Source: Global and China Sugar Industry Report, 2014-2017

Since 2012, despite a rising downstream demand, China's sugar manufacturers has suffered great losses, hurt by lower table sugar prices and rising costs of production. In H1 2014, up to 66.0% of Chinese sugar producers made losses. Although sugar factories, especially small and medium-sized enterprises, were facing business difficulties, yet industry integration is difficult.

The acceleration of sugar industry integration through mergers and acquisitions is in line with the government's expectation, but large sugar manufacturers are generally in a shortage of funds, and if they acquire small and medium-sized enterprises that have no technical and cost advantages, they would suffer losses. At present, some big sugar manufacturers like Nanning Sugar Industry are more inclined to take technological upgrading to improve sugar business while others such as Guangxi Guitang (Group) and Xinjiang Guannong Fruit & Antler Group would reverse the plight by cutting sugar business and expanding other industries.

Global and China Sugar Industry Report, 2014-2017 mainly deals with the followings:

- Development status, supply and demand, import and export, price trend, etc. of global sugar industry;
- Development status, supply and demand, import and export, price trend, development prospects, etc. of sugar industry in China
- Development status, import and export, development prospects, etc. of downstream industries and rival commodities industries of sugar industry in China;
- Operation, investment and M&A, business analysis, development forecast, etc. of 2 global and 11 Chinese major sugar companies.

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- 1.1 Sugar Related Concepts
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