China Cold Chain Logistics Industry Report, 2014-2017

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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

Since Cold Chain Logistics Development Plan of Agricultural Products was introduced in 2010, China cold chain logistics industry has entered an unprecedented rapid development stage. In October 2014, the State Council issued Medium and Long-term Development Plan of Logistics Industry (2014-2020) to boost the cold chain logistics industry toward large scale, standardization and modernization.

China cold chain logistics industry is divided into two sectors: refrigeration and transportation. In the refrigeration field, Refrigerator Branch of China Warehousing Association released that China's cold storage capacity increased by 9.68% year on year to 83.45 million cubic meters in 2013, fulfilling the goals stipulated by Cold Chain Logistics Development Plan of Agricultural Products ahead of schedule. In 2014, China's cold storage building developed steadily with the cold storage capacity of 88.42 million cubic meters.

In the competitive cold chain logistics industry, cold chain distribution and storage centers provide refrigeration services for local agricultural markets; cold chain enterprises build cold storage according to their market layout, for example, Yurun will set up 15 agricultural product cold chain parks in 2015 in accordance with its "333" plan; the professional cold storage operator Swire intends to accomplish 13 large modern cold storage facilities so as to create a nationwide cold chain network by the end of 2020.

100,000-ton Cold Storage Projects under Construction in China, 2014

No.	Project	Cold Storage Capacity (10kt)	Location
1	Shenyang Run Heng International Agricultural Trading Center	40	Shenyang
2	Nanjing Tianhuan Guchangcang Trade Plaza	30	Nanjing
3	Hebei Gaobeidian Agricultural Logistics Park	21	Baoding
4	Zhucheng Longhai Aquatic Cold Chain Logistics Project Phase II	20	Zhucheng
5	Chongqing Cold Chain Logistics Park Phase I	20	Chongqing
6	Lu'an Jibao Wanjiang International Cold Chain Logistics Park	20	Lu'an
7	Jiangxi Haobo Aquatic Cold Chain Logistics Center	20	Nanchang
8	Dalian International Cold Chain Food Trading Center Phase II	20	Dalian
9	Chengdu Hai Pa Wang Western Food Logistics Park	20	Chengdu
10	Yantai Ande International Cold Chain Logistics Center	15	Yantai
11	Mianyang International Agricultural Logistics Port	15	Mianyang
12	Yunnan ASEAN International Cold Chain Logistics Center Phase II	14	Kunming
13	Beijing Xinfadi 120,000-ton Cold Storage Project	12	Beijing
14	Swire Cold Chain Logistics (Nanjing) Co., Ltd.	12	Nanjing
15	Swire Cold Chain Logistics (Ningbo) Co., Ltd.	10	Ningbo
16	China Western Agricultural Cold Chain Logistics Center	10	Chongqing
17	Taizhou Hailing Yurun International Agricultural Logistics Center	10	Taizhou
18	Qingdao Dongzhuangtou International Agricultural Trading Center	10	Qingdao
19	Jining International Agro-aquatic Cold Chain Logistics Wholesale City	10	Jining
20	Haihong International Food Logistics Port	10	Urumqi
21	Guizhou Niulangguan cold chain project	10	Guiyang
22	Baotou Runheng Modern Agricultural Logistics Park	10	Baotou
23	Anyang Topin Cold Chain Logistics, Processing And Distribution Base	10	Anyang

Source: China Cold Chain Logistics Industry Report, 2014-2017, ResearchInChina

As for cold chain transport, the issuance of "Twelfth Five-Year" Cold Chain Plan promoted the size of Chinese refrigerated truck market substantially. China's output of refrigerated and insulated vehicles jumped 13.8% year on year to 7,063 in 2012 and soared 88.5% year on year to 13,315 in 2013. The growth was attributed to two reasons. First, the cold chain distribution scale expanded constantly, some areas even adopted compulsory cold chain distribution measures. Second, China upgraded emissions standards (from the national emissions standards Ⅲ to the national emissions standards Ⅳ) for heavy-duty trucks, so manufacturers raised the number of registered certificates for the vehicle models complying with the national emissions standards Ⅲ in advance to reduce production costs.

47 qualified companies have participated in the competition for refrigerated trucks. Among the top players including CIMC (Shandong), Zhengzhou Hongyu, Henan Bingxiong, Henan Frestec, Zhenjiang Speed Auto and KF Mobile, CIMC (Shandong) occupies the Shandong market, and seizes market share in Guangdong, Zhejiang, Hubei and other places; Henan Bingxiong performs outstandingly in Northeast China, Shanxi and Inner Mongolia; Zhenjiang Speed Auto and KF Mobile focus on East China and dominate the East refrigerated truck market. Zhengzhou Hongyu not only takes a favorable position via giants such as Shuanghui, Yurun, Topin, Sanquan and Synear in Henan, but also makes some achievements in Beijing, Hebei, Ningxia, Jiangsu and other markets.

The report mainly covers the following aspects:

- Overview of China cold chain logistics industry, including definition, classification, industry chain, policies, regulations and future development trends;
- Cold chain logistics modes and demand in meat, fruits & vegetables, frozen rice & flour, frozen seafood, dairy products, pharmaceuticals and other fields in China;
- Market size, competitive landscape and development of major market segments, such as cold storage and refrigerated trucks;
- Profile, financial status, output, sales volume, major customers, flagship products, R & D, distribution of production bases and technical characteristics of major cold storage builders (embracing Dalian Refrigeration and Moon Group), 10 cold storage operators (Topin, Shandong Gaishi, Wuhan Wandun, Shenyang Nonstaples, Hunan Red Star, etc.), 10 refrigerated truck manufacturers (Beiqi Foton, Henan Bingxiong, CIMC, Henan Frestec, Zhengzhou Hongyu, etc.), as well as 12 cold chain logistics operators (Shanghai Haibo, Shanghai Jin Jiang International Industrial Investment, China Railway Tielong Container Logistics, CMAC, Guangdong Swire Cold Chain Logistics, Beijing Huarifeitian, etc.).

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