

Investment Report of China Food & Beverage Industry, 2000-2008

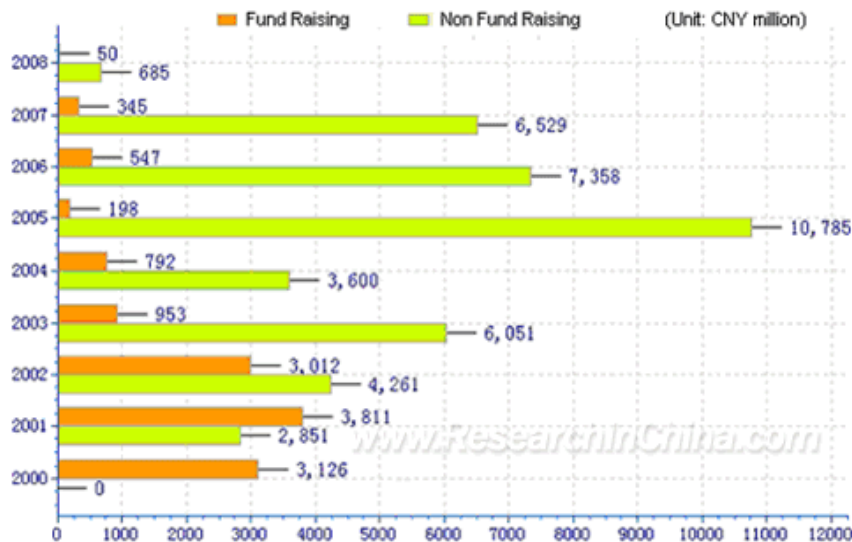
Abstract

The report makes an in-depth analysis on all investment projects financed by 45 listed companies in China's food and beverage industry, and makes a summary on investment trend of China's food and beverage industry as well as investment characteristics and trend of all the listed companies.

According to our study on all information released by the listed companies in China's food and beverage industry, their investment has gone through a sharp rise in the early stage and a slow down in the latter stage in the period 2000 to 2008. The total investment was more than tripled in the five years of 2000 to 2005, and broke the mark of CNY10 billion successfully in 2005. Then in the following two years of 2006 to 2007, it started declining slowly, but still remained at a relatively high level. Since we have not got enough information released so far this year by the listed companies to make a conclusion about investment trend of China's food and beverage industry, so we need wait and see the investment trend.

The following chart shows clearly that non fund raising played a dominant role in investment in the industry before 2003, and it had an absolute superiority after 2003.

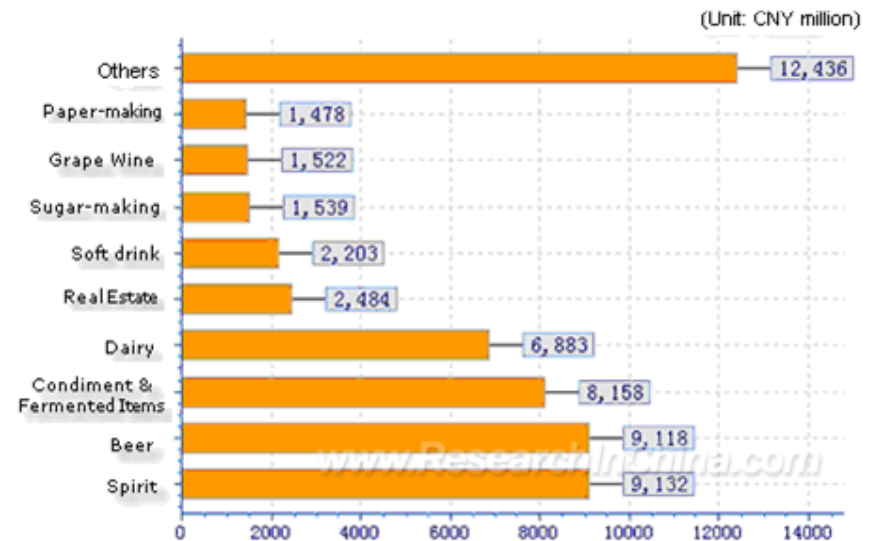
Annual Investment of Listed Food & Beverage Companies, 2000-2008



Source: ResearchInChina

In the period 2000 to 2008, liquor, beer, condiment & fermentation and dairy products are the four sub-industries which have got the most investment in China's food and beverage industry. Among which, liquor and beer all had an investment of more than CNY9 billion respectively. Moreover, China's booming real estate industry has also attracted much investment.

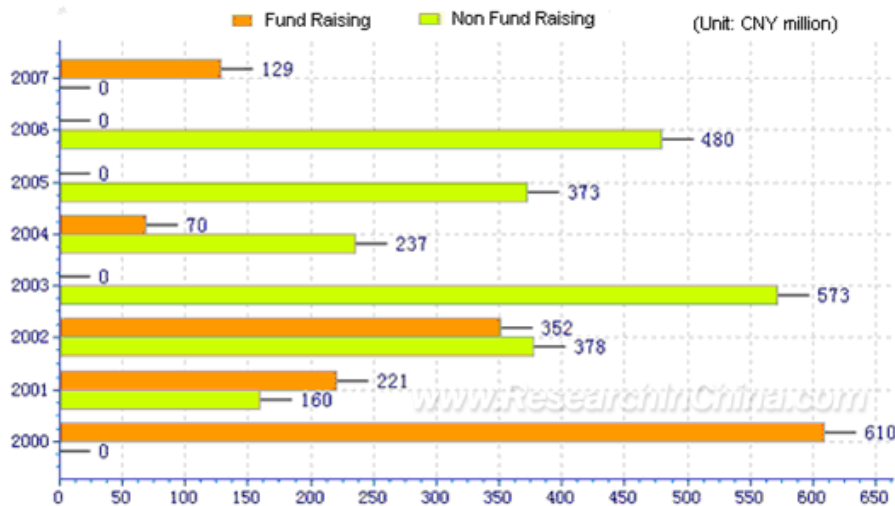
Annual Investment Trend of Listed Food & Beverage Companies by Segments, 2000-2008



Source: ResearchInChina

The report summarizes and analyzes all investment projects financed by the 45 listed companies, like Yanjing Beer.

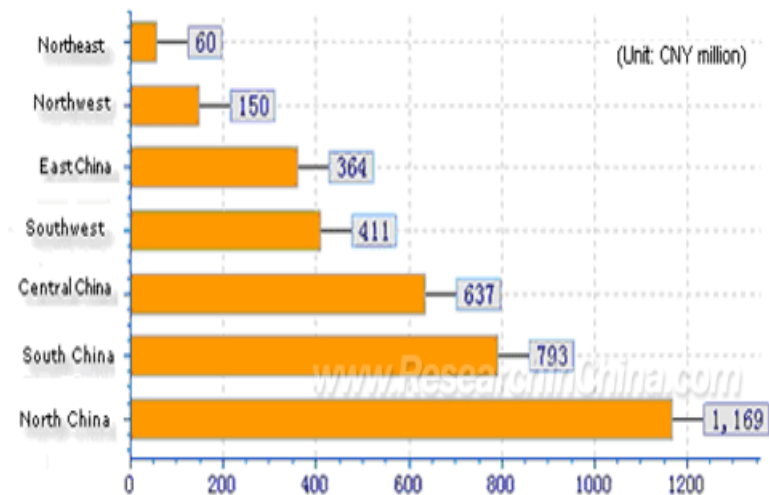
Annual Investment Trend of Yanjing Beer, 2000-2008



Source: ResearchInChina

The following chart shows that Yanjing Beer's investment in North China is the biggest, reaching CNY1.169 billion, and then South China and Central China follow by an investment of CNY793 million and CNY637 million respectively.

Yanjing Beer's Investment by Region, 2000-2008



Source: ResearchInChina

Investment Characteristics of Yanjing Beer

- The company is specialized in the production and sales of beer. It will lay more emphasis on the development of its main business in the future with its focuses on expanding the production and sales of beer, broadening its sales channels and enlarging its market share.
- Its development strategy is to mainly develop the regions with market advantages. So far, Beijing, Guangxi Zhuang Autonomous Region and Inner Mongolia Autonomous Region have become the three key profit centers, and other provinces, like Fujian and Hubei, are in the stage of development. In recent years, it has invested chiefly in North China and South China, followed by Central China, Southwest and East China. The company has a regular amount of investment each year.
- While expanding the production and sales of ordinary beer, the company also makes sustained efforts to improve its medium- and high-end products and increase their proportions. As for its marketing strategy, it focuses on the development of its five core markets in Beijing, Guangxi Zhuang Autonomous Region, Inner Mongolia Autonomous Region, Fujian Province and Hubei Province. Yanjing Beer has become one of sponsors for 2008 Beijing Olympics to expand the popularity of its brand. Faced with soaring prices of raw materials, it has promoted the construction of barley production bases in Northwest and Northeast, and has established its own malt production bases in Xinjiang Uygur Autonomous Region and Inner Mongolia Autonomous Region. Its investment is rather concentrative.
- Its future development will still focus on the production and sales of beer. While consolidating its five key markets, it will penetrate the other provinces actively. Therefore, its investment in marketing may increase in the future.
- *Notes: We can update the data in the report to the most recent quarter, when the report is purchased.*

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