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Survey of Sugar in China

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Abstracts

This report provides an overview of China's sugar industry and the following aspects are answered in this report: What is the current supply pattern of sugar in China? What is the major factor affecting the domestic market of sugar in recent seasons? Are there any trends among domestic sugar producers and how will they deal with the market change and the impact from imported sugar, which is much cheaper than domestic product?

Output of sugar crops were in rise cycle during 2010 and 2013, and reached 133.61 million tonnes in 2013, up 14.5% over 2010. As a result, the domestic output of sugar also witnessed continuous growth, reached 13.32 million tonnes in 2013/2014 season with a growth of 27.4% over 2010/2011.

Guangxi Zhuang Autonomous Region and Yunnan Province are the two largest planting regions of sugar crops in China, together accouting for about 75% of the total output in China in 2013. The two provinces are also the major production region of sugar in China,accouting for 64.3% and 17.3% of total sugar output in 2013/2014 season, respectively.

The production bases of most major sugar producers in China are located in Guangxi and Yunnan, due to the abundant supply of sugar crops. Through purchase, technical transformation, and construction of new sugar plants, top producers have been expanding their crushing capacites of sugar crops in the past four seasons. By contrast, some small producers have stopped production due to weak market and losses in recent seasons.

In recent seasons, import of sugar started playing a more important role in the supply of sugar in domestic market. The import volume of sugar in China witnessed a sharp growth in recent years, from 1.06 million tonnes in 2009 to the historical high of 4.55

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million tonnes in 2013.

The increasing supply and competition from imported sugar resluted in sharp decline in market price of sguar in China. In Sept. 2014, the price saw a bottom of USD682/t, down 41% over the USD1,160/t in Oct. 2011. Most domestic producers witnessed losses in 2012/2013 and 2013/2014 seasons. It's worth mentioning that, many domestic sugar producers have introduced the business of processing imported raw sugar, in order to avoid risks when domestic sugar price is in down cycles.

Considering the huge inventory, it's predicted that the oversupply of sugar in China will continue in the following two seasons since 2014/2015, although the domestic output and global supply will enter decline cycle in future.

The following data and analysis are unveiled in this report:

Plant area and output of sugar crops in China, 1980s-2014E;

Output of sugar crops in major plant regions, 2013;

Comparison between China and Brazil in the purchasing price of sugarcane, 2010/2011-2013/2014 season;

Output, import, and consumption of sugar in China, 2010/2011-2013/2014 season;

Production of major sugar producers in China, 2010/2011-2013/2014 season;

Consumption pattern of creatine in China, 2014;

Market price of sugar in China, 2010-2014;

Forecast on the futrure trend of sugar market in China, 2014/2015-2017/2018 season.

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COMPANIES MENTIONED

Guangxi Yangpu Nanhua Sugar Group Co., Ltd.,Guangxi Nanning East Asia Sugar Co., Ltd.,Guangdong Hengfu Sugar Industry Group Co., Ltd.,Guangxi State Farms Sugar Industrial Group Co., Ltd.,Nanning Sugar Industry Co., Ltd.

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