

Research Report On China's Aquatic Products Market

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Abstracts

The total domestic consumption of aquatic products in China has reached 46 million tons in 2006. In which the market share of imported aquatic products account for 1.6%-2% of total. Since China has become the world biggest country in fishery and aquiculture, the current total value of China exported aquatic products takes up to 10% of world gross export value of aquatic products, reached USD 8.96 billion in 2006.

The value of China imported aquatic products has kept steadily increasing since China opened the market. In 2006, the gross value of imported aquatic products reaches up to USD 3.19 billion, increased by 9.63% over that of the previous year and is 2.03 times of that in 2002. In the first six months of 2007, China imported aquatic product has been up to 1717 thousand tons, deducting 810 thousand tons of materials for processing of imported products and 521 thousand tons of fish powder, the actual imported aquatic products for resident consumption is 386 thousand tons (exclude ship back of ocean capture), which is 19.9% increase over the same period of the previous year. In which, the frozen fish from Russia is the main source of raw materials for further processing in China; Peru is the largest source country of China imported fish powder; Aquatic products for direct edible consumption are mainly to meet the demands for aquatic products in China caused by the limited supply domestically and the products mainly include frozen fish, like hairtail, clupeoid and codfish etc., mollusks (sleevefish) and shrimp.

In recent years, the purchasing power and willingness of China consumers present an increasing tendency. Both for urban and rural consumers, consumption in catering industry as well as household, in coastal aquatic products consumption areas or non-consumption areas for aquatic products of inland cities, the proportion and consumption quantity of aquatic products are both increasing. But compared with Korea, Japan, Chinese Taiwan and Europe, the per capita consumption of aquatic products in China is still in the low level, only 16.2 kilos in urban residents and 5.6 kilos in rural in the year

2006. There are huge development potential and improve space in China aquatic products market. After finishing this research work, we can make a reserved estimation that the average annual increase of 5%-6% will be available for the demand of aquatic products in domestic market in the period from now to 2010 with an annual consumption of 45.20 million tons to 52.55 million tons.

In China domestic market, the low end aquatic products mainly refer to grass carp, crucian, bighead carp, tilapia, hairtail and shrimps; main medium level fish include mandarin fish, river eel, eel, rainbow trout, pelteobagrus vachelli and weever etc.; high end consumables refer to imported products such as sturgeon, southern catfish, channel catfish, eel, ivory clam, sea cucumber and sea-ear, etc..

The consumption of aquatic products in China presents a stepping declination from east to west. Coastal cities in east and south parts of China and large and medium sized developed cities are the main areas consuming aquatic products. But with the development of transportation and freshwater farming, the consumption of aquatic products in inland cities has enlarged a lot than before. Judging from the supervision of the change of aquatic products consumption quantity, we can see that the growing tendency is no obvious in traditional consumption areas of aquatic products such as east and south parts of China, which proves that the increase of China increasing consumption on aquatic products rely mainly on the growth in inland cities, especially areas with developed economy (such as Shanxi, Hubei, Hebei and Henan etc.).

The sale season of aquatic products in China is mainly influenced by the two factors of seasonal production of fishery and holiday consumption. From October every year to March of the next year are the high season for aquatic products. Traditional festivals and holidays such as National Day, May Day holiday and New Year holiday, Spring Festival are all included in this period of time. The demand increases largely and the large quantity of aquatic products entering market ensures the supply.

Through this study, we believe that China aquatic products market mainly constituted of fish is in a rising period of gradual mature. In the coming ten years, the consumption in domestic market will mainly from domestic produced aquatic products and compensated by import aquatic products. The export market is similar to this, re-export of processed import raw materials will work as a compensation for a long time and will increase steadily. After a comprehensive analysis of domestic aquatic products market, factors that will promote the increase of import aquatic products include the following: The protection of domestic natural resources of fishery increases the demand for imported aquatic products; The enhancement of purchase capacity and adjustment of

diet structures of domestic consumers enlarge the market capability, thus enlarging the demand for import aquatic products; The appreciation of RMB increases the ration of quality to price of import aquatic products; The continual increase of China exported aquatic products bring with a strong demand for imported aquatic products raw materials.

Contents

CHAPTER 1 OVERVIEW

- 1.1 Overview Of China Aquatic Products Market
 - 1.1.1 Product Definition
 - 1.1.2 Introduction To The China Current Macroeconomic Environment
 - 1.1.3 Introduction To The Current Situation Of China Aquatic Products Market
- 1.2 Analysis on the characteristics of China aquatic products market

CHAPTER 2 MARKET INFORMATION

- 2.1 Developing Trends Of China Aquatic Products Market
- 2.2 The Prospect Of China Aquatic Products Market
 - 2.2.1 Analysis On The Output Of China Aquatic Products
 - 2.2.2 Analysis On The Demands Of Imported Aquatic Products
 - 2.2.3 Analysis On China Aquatic Products Market Potential
- 2.3 Introduction To China Aquatic Products Market Segmentation
 - 2.3.1 Subdivided By Main Domestic Origins
 - 2.3.2 Subdivided By Products Variety
 - 2.3.3 Subdivided By Processing Modes
- 2.4 Analysis On Buyers' structure, Behavior And Purchasing Power
 - 2.4.1 Analysis On The Consumables Variety
 - 2.4.2 Analysis On The Consumption Regions
 - 2.4.3 Analysis On Buyers' Behaviors
 - 2.4.4 Analysis On Buyers' Purchase Power
 - 2.4.5 The Perception And The Cycle Of The Consumer's Reference
- 2.5 Introduction To The Seasons Of Sale Of Aquatic Products In China
- 2.6 Introduction To The Common Types Of Aquatic Products In China
 - 2.6.1 Fish
 - 2.6.2 Testacean Products
 - 2.6.3 Crustacean Products

CHAPTER 3 TRADE INFORMATION

- 3.1 Analysis On China Import Changes Of Aquatic Products In Recent Five Years
 - 3.1.1 Anyalysis On Import Changes Of Aquatic Products
 - 3.1.2 Analysis On The Import Trend Of Subdivided Aquatic Products
 - Analysis On The Import Trend Of Live Fish Products (HS Code:0301)

Analysis On The Change In The Import Of Fish Meat And Products Of In Recent Years (HS Code: 0302?0303?0304?0305?1604)

Analysis On The Change In The Import Of Other Crustacean Mollusks Products In Recent Years (HS Code: 0306?0307?1605)

3.1.3 Analysis On The Main Domestic Flow Directions Of China Imported Aquatic Products

3.2 Introduction To The Main Origins Of China Imported Aquatic Products

3.2.1 Analysis On The Top Ten Origins By China Imported Value On Aquatic Products

Top Ten Origins By China Imported Value On Live Fish Products

Analysis On The Top Ten Origins By China Imported Value On Fish Meat And Products Of

Analysis On The Top Ten Origins By China Imported Value On Other Crustacean Mollusks Products

3.2.2 Analysis On The Top Ten Origins By China Imported Quantity On Aquatic Products

Top Ten Origins By China Imported Quantity On Live Fish Products

Top Ten Origins By China Imported Quantity On Fish Meat And Products Of

Top Ten Origins By China Imported Quantity On Other Crustacean Mollusks Products

3.3 Analysis On The Entry Into China Aquatic Products Market

3.4 Introduction To The Relative Import Laws And Regulations Of China

3.4.1 Relative Laws And Regulations

3.4.2 On The Important Points Of Relative Laws And Regulations

3.5 Analysis On China Export Changes Of Aquatic Products In Recent Five Years

3.5.1 Analysis On The Changes Of Export Of China Aquatic Products

3.5.2 Main Destinations Of China Exported Aquatic Products

CHAPTER 4 TRADE STRUCTURE

4.1 Introduction To The Sales Channel Of Aquatic Products In China

4.1.1 Figure Of Domestic Sales Channel Of Aquatic Products In China

4.1.2 Introduction To The Main Sales Channel

4.1.3 The Price System Of Aquatic Products

4.2 Analysis On China Aquatic Products Industry Policy

CHAPTER 5 ANALYSIS ON MARKET ENTRY BARRIERS IN CHINA

5.1 Analysis On The Non-Tariff Control Of Selling Aquatic Products In China

5.1.1 Introduction To The Relative Standard And Inspection System Of Aquatic

Products

Relative Inspection System

Analysis Of Inspection Standards

5.1.2 Relative Compulsory Standards Of The State On Aquatic Products

The Supervision And Management System Of Imported Aquatic Products

Analysis On The Trend Of The Laws And Regulations On Food Safety And

Technological Guarantee System

5.1.3 Introduction To The Requirement On Environment Protection, Safety And Health Protection

5.1.4 Requirement On The Packaging Of Aquatic Products

5.1.5 The Related Agency In The Aquatic Sector Products In China

5.2 Analysis On The Tariff And Import Quota Limitation

5.2.1 Analysis On Import Tariff

CHAPTER 6 LIST OF MAJOR IMPORTERS

APPENDIX

REFERENCE

TABLE CONTENT

Table 1 Categories Of Aquatic Products

Table 2 Basic Indicator Of China Aquatic Industry In 2006

Table 3 Total Output And Growth Rate Of China Aquatic Products From 2002-2006

Table 4 Enterprise Types With Representatives

Table 5 The Quantity And Growth Rate Of China Imported Aquatic Products In 2002-2006 (Unit: Kg)

Table 6 The Sum And Growth Rate Of The Value Of China Imported Aquatic Products In 2002-2006 (Unit: Usd)

Table 7 The Quantity And Growth Rate Of China Imported Live Fish Products In 2002-2006 (Unit: Kg)

Table 8 The Sum And Growth Rate Of The Value Of China Imported Live Fish Products In 2002-2006 (Unit: Usd)

Table 9 The Quantity And Growth Rate Of China Imported Fish Meat And Products Of In 2002-2006 (Unit: Kg)

Table 10 The Sum And Growth Rate Of The Value Of China Imported Fish Meat And Products Of In 2002-2006 (Unit: Usd)

Table 11 The Quantity And Growth Rate Of China Imported Other Crustacean Mollusks

Products In 2002-2006 (Unit: Kg)

Table 12 The Sum And Growth Rate Of The Value Of China Imported Other Crustacean Mollusks Products In 2002-2006 (Unit: Usd)

Table 13 Top 10 Destinations With The Highest Import Value Of China Imported Aquatic Products In 2006, The Import Value And Growth Rate In The Past Years (Unit: Usd)

Table 14 Top 10 Destinations With The Highest Import Quantity Of China Imported Aquatic Products In 2006, The Import Quantity And Growth Rate In The Past Years (Unit: Kg)

Table 15 Top Ten Origins By China Imported Value On Live Fish Products In 2006 And The Annual Growth Rate In The Past Years (Unit: Usd)

Table 16 Top Ten Origins By China Imported Value On Fish Meat And Products Of In 2006 And The Annual Growth Rate In The Past Years (Unit: Usd)

Table 17 Top Ten Origins By China Imported Value On Other Crustacean Mollusks Products In 2006 And The Annual Growth Rate In The Past Years (Unit: Usd)

Table 18 Top Ten Origins By China Imported Quantity On Live Fish Products And The Annual Growth Rate In The Past Years (Unit: Kg)

Table 19 Top Ten Origins By China Imported Quantity On Fish Meat And Products Of And The Annual Growth Rate In The Past Years (Unit: Kg)

Table 20 Top Ten Origins By China Imported Quantity On Other Crustacean Mollusks Products And The Annual Growth Rate In The Past Years (Unit: Kg)

Table 21 Value And Growth Rate Of China Exported Aquatic Products In 2002 To 2006

Table 22 Exported Value Of Subdivided Aquatic Products

Table 23 Top Ten Destinations Of China Exported Aquatic Products In 2006 And The Annual Growth Rate In The Past Years (By Export Value, Unit: Usd)

Table 24 Sensory Requirements On Non-Environmental Pollution Aquatic Products

Table 25 Requirements On The Freshness Of Non-Environmental Pollution Aquatic Products

Table 26 The Maximum Content Of Hazardous And Poisonous Substances In Non-Environmental Polluted Aquatic Products

Table 27 Index Of Microbe

Table 28 Physical And Chemical Index Of Fresh And Frozen Aquatic Products Of Animal Origin

Table 29 Veterinary Drug Maximum Residue Limits In The Food Of Animal Origin

Table 30 Relative Compulsory Standards Of The State On Aquatic Products

Table 31 Relative Standards On The Net Content On The Label Of Prepackaged Aquatic Products

FIGURE CONTENT

Figure 1 Total Output Of China Aquatic Products From 2002-2006 (Unit: 10 Thousand Tons)

Figure 2 Output Proportion Of Subdivided Aquatic Products In 2006

Figure 3 China And World Per Capita Aquatic Products Consumption

Figure 4 China Aquatic Products Output In 2006 Subdivided By Main Origins

Figure 5 China Aquatic Products Output In 2006 Subdivided By Main Types

Figure 6 China Aquatic Products Output In 2006 Subdivided By Processing Modes

Figure 7 Proportion Of Various Water Area In Seawater Breeding

Figure 8 Proportion Of Various Water Area In Fresh Water Breeding

Figure 9 China Fish Output In 2006 Subdivided By Processing Modes

Figure 10 Subdivided Output Of Fish Of Seawater Farming By Main Types (Unit: 10,000 Tons)

Figure 11 Output Of Bred Testaceans In 2006 By Main Types (Unit: 10,000 Tons)

Figure 12 Proportion Of Freshwater Bred Crustacean Products Subdivided By Main Types In 2006

Figure 13 Change In The Quantity Of China Imported Aquatic Products In The Year 2002-2006 (Unit: Kilogram)

Figure 14 Change In The Value Of China Imported Aquatic Products In The Year 2002-2006 (Unit: Usd)

Figure 15 The Imported Proportion That Subdivided Aquatic Products Take Up In The Year 2006 (Unit: Usd)

Figure 16 Trend Of The Quantity Change Of China Imported Live Fish Products In The Year 2002-2006 (Unit: Kg)

Figure 17 Trend Of The Value Change Of China Imported Live Fish Products In The Year 2002-2006 (Unit: Usd)

Figure 18 The Quantity Change Of China Imported Fish Meat And Products Of In 2002-2006 (Unit: Kg)

Figure 19 The Value Changes Of China Imported Fish Meat And Products Of In 2002-2006 (Unit: Usd)

Figure 20 The Quantity Change Of China Imported Other Crustacean Mollusks Products In 2002-2006 (Unit: Kg)

Figure 21 The Value Change Of China Imported Other Crustacean Mollusks Products In 2002-2006 (Unit: Usd)

Figure 22 Top 10 Destinations With The Highest Value Of China Imported Aquatic Products In 2006

Figure 23 Trend Of The Import Value Of China Imported Aquatic Products In Main Destinations In The Past Years (Unit: %)

Figure 24 Top Ten Origins By China Imported Value On Live Fish Products In 2006

Figure 25 Trend Of Main Origins By China Imported Value On Live Fish Products (Unit: %)

Figure 26 Top Ten Origins By China Imported Value On Fish Meat And Products Of In 2006

Figure 27 Trend Of Main Origins By China Imported Value On Fish Meat And Products Of (Unit: %)

Figure 28 Top Ten Origins By China Imported Value On Other Crustacean Mollusks Products

Figure 29 Trend Of Main Origins By China Imported Value On Other Crustacean Mollusks Products In The Past Years (Unit: %)

Figure 30 Top Ten Origins By China Imported Quantity On Live Fish Products

Figure 31 Trend Of Main Origins By China Imported Quantity On Live Fish Products In The Past Years (Unit: %)

Figure 32 Top Ten Origins By China Imported Quantity On Fish Meat And Products Of (Unit: Kg)

Figure 33 Trend Of Main Origins By China Imported Quantity On Fish Meat And Products Of In The Past Years (Unit: %)

Figure 34 Top Ten Origins By China Imported Quantity On Other Crustacean Mollusks Products

Figure 35 Trend Of Main Origins By China Imported Quantity On Other Crustacean Mollusks Products In The Past Years (Unit: %)

Figure 36 Changes Of Value Of China Exported Aquatic Products In 2002-2006

Figure 37 The Export Proportions That Subdivided Aquatic Products Take Up In 2006 (Unit: Usd)

Figure 38 Top Ten Destinations Of China Exported Aquatic Products (By Export Value)

Figure 39 Price System Of China Aquatic Products

Figure 40 Import Flow For Aquatic Products

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