

# China Aquaculture Industry Report, 2010

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## Abstracts

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Alongside with the improving living standard of people, the consumption of high-protein aquatic products goes up year by year, and the robust demand drives the output of aquatic products to grow ever. In 2009, China's output of aquatic products achieved 51.20 million tons, up 4.6% from a year earlier. As far as the product mix is considered, the output of seawater products has an annually bridging gap with that of freshwater products in percentage, with a share of 52.4% and 47.6% , respectively.

China increases its export volume of aquatic products with the soaring demand in overseas market. In the first three quarters of 2010, the export volume and value of aquatic products of China reached 2.302 million tons and USD 9.52 billion respectively, an increase of 8.9% and 25.6% from the same period of last year. Of all, prawn, shellfish, tilapia, eel and large yellow croaker are still major exporting varieties, with the total export value providing 50.2% of the total export value of aquatic products. As for the unit export price, eel and large yellow croaker gained the huge growth by 38.7% and 43.4% respectively. Coastal provinces like Shandong and Guangdong are the major exporters of aquatic products which are largely exported to the US, Japan and South Korea.

Concerning the processing of aquatic products, the operating income of aquatic product processing enterprises has increased since 2006. Between January and August of 2010, the yields of the industry totaled RMB 198 billion. When it comes to the sub-industries, the frozen processed food market experiences a burgeoning demand influenced by the dietary habit of consumers. In Jan.-Aug. 2010, the operating income of this sub-industry reaped RMB 150.5 billion, contributing 76% of the whole aquatic

products processing industry. However, the soaring cost in refrigerating storage, transportation and procurement resulted in the meager gross margin which fluctuated between 11% and 12% during 2006-Aug. 2010.

The report analyzes the aquaculture industry as a whole and highlights the operation and development of the leading domestic enterprises, including HOMEY Group International, Dalian Yiqiao Marine Seeds Co., Ltd, Zhanjiang Guolian Aquatic Products Co., Ltd., Zhangzidao Fishery Group, Dahu Aquaculture Company Limited, Shandong Oriental Ocean Sci-Tech Co., Ltd and Guangdong Haid Group Co., Ltd.

HOMEY Group International is mainly engaged in the cultivation of sea cucumber and jelly fish products with higher gross margin. In the first half of 2010, the gross margin of the company realized 47.1%. HOMEY Group International plans to expand the sea cucumber cofferdam breeding area to 50,000 mu by 2014. And it is expected to see a potential growth in the profit for the company thanks to the rich aquatorium resources.

Dalian Yiqiao Marine Seeds Co., Ltd, a domestic flagship enterprise involved in the breeding of rare seafood seed, focuses on the cultivation and sales of sea cucumber and shrimp seeds. In the first half of 2010, the operating income of the company recorded RMB 140 million, with the integrated gross margin reaching 45.4%, higher than its counterparts. However, the downstream industry of the company concentrates in Liaoning Province by region which means the converged sales regions, thus bringing risk in operation.

Zhanjiang Guolian Aquatic Products Corp. Ltd. and Zhangzidao Fishery Group are both typical industry integrated enterprises; wherein, the revenue of the former is primarily sourced from the processing and exporting of prawn; while the latter focuses on the breeding of *patinopecten yessoensis* and abalone which features higher gross margin. Dahu Aquaculture Company Limited, committing itself to freshwater fish products, launched brand strategy in 2010 and established the designated sales outlets of fresh and live aquatic products, expanding its selling markets towards Southwest China from Central South. In addition, Shandong Oriental Ocean Sci-Tech Co., Ltd is specialized in export business of aquatic products with the business pattern of "Aquaculture plus Aquatic Product Processing", and the company in 2010 dabbled in salmon breeding, in a move to further perfect its product structure. In the same year, Guangdong Haid Group Co., Ltd. which placed aquatic feed as its major business also introduced fish & shrimp seed business and was involved in aquatic products seed breeding sector, ushering into an era of industry integration.

## Contents

### **1.OVERVIEW OF AQUACULTURE INDUSTRY**

- 1.1 Basic Concepts
- 1.2 Product Types
  - 1.2.1 Regular Aquatic Products
  - 1.2.2 Famous Products
  - 1.2.3 Superior Products for Export

### **2. OPERATION ENVIRONMENT OF CHINA AQUACULTURE INDUSTRY, 2010**

- 2.1 Industry Policy
  - 2.1.1 Regulation on Quality Safety Management of Aquaculture
  - 2.1.2 Organic Certification Standard
- 2.2 Ecological Environment

### **3. DEVELOPMENT OF CHINA AQUACULTURE INDUSTRY, 2010**

- 3.1 Market Development
- 3.2 Supply & Demand
- 3.3 Aquatic Products Processing

### **4. MARKET SEGMENTS OF AQUATIC PRODUCTS, 2010**

- 4.1 Regular Fish Market
- 4.2 Shrimp & Crab Market
- 4.3 Terrapin Market
- 4.4 Shellfish Market
- 4.5 Rare Seafood Seed

### **5. IMPORT & EXPORT OF CHINESE AQUACULTURE PRODUCTS, 2010**

- 5.1 Overview
- 5.2 Import & Export
  - 5.2.1 Export Varieties
  - 5.2.2 Exporting Province
  - 5.2.3 Export Market
  - 5.2.4 Contracting Export Volume of Processing Products

### 5.2.5 Import Volume Keeps Growing

## **6. AQUACULTURE REGIONS IN CHINA, 2010**

### 6.1 Fujian

#### 6.1.1 Output

#### 6.1.2 Import & Export

### 6.2 Shandong

#### 6.2.1 Output

#### 6.2.2 Import & Export

### 6.3 Jiangsu

#### 6.3.1 Output

#### 6.3.2 Import & Export

### 6.4 Liaoning

#### 6.4.1 Output

#### 6.4.2 Import & Export

### 6.5 Guangdong

#### 6.5.1 Output

#### 6.5.2 Import & Export

### 6.6 Zhejiang

#### 6.6.1 Output

#### 6.6.2 Import & Export

## **7. KEY ENTERPRISES**

### 7.1 Dalian Yiqiao Marine Seeds Co., Ltd

#### 7.1.1 Profile

#### 7.1.2 Operation

#### 7.1.3 Advantages & Development Strategy

### 7.2 Zhanjiang Guolian Aquatic Products Co., Ltd

#### 7.2.1 Profile

#### 7.2.2 Operation

#### 7.2.3 Advantages & Development Strategy

### 7.3 Guangdong Haid Group Co., Ltd.

#### 7.3.1 Profile

#### 7.3.2 Operation

#### 7.3.3 Development Strategy

### 7.4 HOMEY Group International

#### 7.4.1 Profile

- 7.4.2 Operation
- 7.4.3 Development Strategy
- 7.5 Dahu Aquaculture Company Limited
  - 7.5.1 Profile
  - 7.5.2 Operation
  - 7.5.3 Development Strategy
- 7.6 Shandong Oriental Ocean Sci-Tech Co., Ltd
  - 7.6.1 Profile
  - 7.6.2 Operation
  - 7.6.3 Development Strategy
- 7.7 Zhangzidao Fishery Group
  - 7.7.1 Profile
  - 7.7.2 Operation
  - 7.7.3 Development Strategy
- 7.8 Guangzhou LUXE Seafood ENT.LTD
  - 7.8.1 Profile
  - 7.8.2 Operation
  - 7.8.3 Development Strategy
- 7.9 Xunshan Group
  - 7.9.1 Profile
  - 7.9.2 Development Strategy
- 7.10 Dalian RainLion Group
  - 7.10.1 Profile
  - 7.10.2 Development Strategy

## Selected Charts

### SELECTED CHARTS

China's Five Major Supporting Policies on Aquaculture Industry and the Influence  
Percentage of Established Sea Properties by Utilization Type in China, 2009  
Output and YoY Growth of China Aquatic Products, 2005-2009  
Output of China Seawater Products and Freshwater Products, 2005-2009  
Per Capita Consumption Expenditure and Its Growth of Aquatic Products and Food of Chinese Residents in Urban Regions, 2005-2009  
Number of Aquatic Product Processing Enterprises in China, 2006-Aug. 2010  
Number of Enterprises in Aquatic Product Processing Sub-industries of China, 2006-Aug.2010  
Operating Income and Total Profit of China Aquatic Product Processing Industry, Jan.-Aug., 2006-2010  
Gross Margin of China Aquatic Product Processing by Sub-industry, Jan.-Aug.,2006-2010  
Operating Income and Total Profit of China Aquatic Product Processing by Sub-industry, Jan.-Aug., 2006-2010  
Output of Saltwater Fish and freshwater Fish of China, 2006-2009  
Output of Saltwater Shrimp & Crab and Freshwater Shrimp & Crab of China, 2006-2009  
Market Prices of Common Testudinate Germchit in China, 2010  
Output of Saltwater and Freshwater Shellfish in China, 2006-2009  
Rare Seafood Breeding Enterprises in China  
Export Volume and Percentage of Major Aquatic Products in China by Type, 2009  
Export Volume and Value of China Aquatic Products by Product, Jan.-Sep. ,2010  
Provinces (China) Exporting Aquatic Products and Export Volume, 2009  
Provinces (China) Exporting Aquatic Products and Export Value, Q1-Q3,2010  
Major Export Markets and Export Volume of Aquatic Products in China, 2009  
Major Export Markets and Export Value of Aquatic Products in China, Jan.-Sep.,2010  
Import Volume and Import Value of Major Aquatic Products in China, Jan.-Sep.,2010  
Market Share of Major Imported Aquatic Products in China, Jan.-Sep.,2010  
Output of Saltwater and Freshwater Aquaculture Products in Fujian, 2004-2009  
Export Volume and Value of Aquatic Products in Fujian, Jan.-Aug.,2010  
Output of Saltwater and Freshwater Aquaculture Products in Shandong, 2004-2009  
Export Volume and Value of Aquatic Products in Shandong, 2008-2009  
Import & Export of Aquatic Products in Shandong, Jan.-Oct., 2010  
Output of Saltwater and Freshwater Aquaculture Products in Jiangsu, 2004-2009  
Export Products and Value of Aquatic Products in Jiangsu, Jan.-Jun.,2010

Major Export Markets and Export Value of Aquatic Products in Jiangsu, Jan.-Jun., 2010  
Output of Saltwater and Freshwater Aquaculture Products in Liaoning, 2004-2009  
Import & Export Volume and Value of Aquatic products in Liaoning, Jan.-Oct.,2010  
Market Share of Major Exported Aquatic Products in Liaoning, Jan.-Oct.,2010  
Output of Saltwater and Freshwater Aquatic Products in Guangdong, 2004-2009  
Major Exported Aquatic Products in Guangdong, 2009  
Major Imported Aquatic Products in Guangdong, 2009  
Output of Saltwater and Freshwater Aquaculture Products in Zhejiang, 2004-2009  
Variety, Volume and Value of Major Exported Aquatic Products in Zhejiang, Jan.-Sep.,  
2009-2010  
Export Destinations, Export Volume and Export Value of Aquatic Products in Zhejiang,  
Jan.-Sep.,2010  
Operating Income and Net Income of Dalian Yiqiao Marine Seeds, 2007-Jun.2010  
Operating Income of Dalian Yiqiao Marine Seeds by Sector and Product,  
Jan.-Jun.,2010  
Regional Market Sales and Percentage of Dalian Yiqiao Marine Seeds, 2007-Jun. 2010  
Operating Income of Dalian Yiqiao Marine Seeds by Region, Jan.-Jun. ,2010  
Vertical Integrated Industry Chain of Zhanjiang Guolian Aquatic Products Co., Ltd  
Operating Income and Net Income of Zhanjiang Guolian Aquatic Products,  
2007-Sep.2010  
Operating Income?Operating Profit and Net Income of Zhanjiang Guolian Aquatic  
Products, 2007-Sep.2010  
Major Businesses of Zhanjiang Guolian Aquatic Products by Variety, H1 2010  
Operating Income, Cost and Gross Margin of Guolian Aquatic Products, H1 2010  
Operating Income and YoY Growth of Guolian Aquatic Products by Region, H1 2010  
Production Edge of Guolian Aquatic Products  
Product Varieties and Applications of Guangdong Haid Group  
Operating Income and Net Income of Guangdong Haid Group, 2006-Sep.2010  
Major Businesses of Guangdong Haid Group by Sector, Jan.-Jun. ,2010  
Operating Income and Gross Margin of Guangdong Haid Group by Product, Jan.-Jun.  
,2010  
Business Pattern of HOMEY Group International  
Operating Income and Net Income of HOMEY Group International, 2008-Sep.2010  
Operating Income and Profit Margin of HOMEY Group International by Product and  
Sector, 2009  
Operating Income and Profit Margin of HOMEY Group International by Product and  
Sector, Jan.-Jun., 2010  
Sea Area Resources of HOMEY Group International  
Operating Income and Profit Margin of Dahu Aquaculture Company Limited by Product



and Sector, Jan.-Jun.,2010

Operating Income and Net Income of Dahu Aquaculture Company Limited,  
2008-Jun.2010

Waters Area and Yield per Mu of Shandong Oriental Ocean Sci-Tech

Major Businesses and Gross Margin of Shandong Oriental Ocean Sci-Tech by Sector,  
Jan.-Jun., 2010

Major Businesses of Shandong Oriental Ocean Sci-Tech by Region, Jan.-Jun., 2010

Major Businesses and Net Income of Shandong Oriental Ocean Sci-Tech,  
2007-Sep.2010

Operating Income and Gross Margin of Zhangzidao Fishery Group by Product,  
Jan.-Jun., 2010

Major Businesses and Gross Margin of Zhangzidao Fishery Group by Sector, Jan.-Jun.,  
2010

Operating Income and Net Income of Zhangzidao Fishery Group, 2007-Sep.2010

Major Businesses and Percentage of Zhangzidao Fishery Group by Region, Jan.-Jun.,  
2010

Five Largest Industry Bases of Dalian RainLion Group



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