

China Aquaculture Industry Report, 2011-2012

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Abstracts

China's output of aquatic products in 2011 amounted to 56.1 million tons, a YoY rise of 4.4%; at the same time, the disparity between seawater and freshwater products in production ratio was narrowing year by year, accounting for 51.9% and 48.1% respectively in 2011.

Following the increased demand of overseas market, the export volume of China's aquatic products also rose to 3.912 million tons in 2011, accompanied by export value of US\$17.79 billion, and presenting a year-on-year rise of 17.1% and 28.7%, respectively. Brand-name, high-quality bred aquatic products like prawn, shellfish, tilapia, eel, large yellow croaker, crayfish, etc. are still the main export varieties, with total export value in 2011 sharing 49.74% of the total export of aquatic products over the corresponding period. Shandong, Fujian and other coastal provinces serve as major exporting provinces for China's aquatic products, in 2011 export volume of Shandong and Fujian accounted for 48.8% of the total. Japan, the United States, Europe and South Korea are still deemed as the most important export destinations of China's aquatic products, to which the aquatic exports made up 86.3% of China's total export of aquatic products in 2011.

China aquatic product processing industry, driven by the expanding aquaculture scale as well as the growing demand from downstream sectors, has witnessed substantial growth, with operating revenue climbing 25.95% YoY to RMB360.1 billion in 2011. Influenced by consumers' eating habits, frozen aquatic product market size has been expanding. In 2011, the frozen aquatic processing industry achieved the revenue of RMB275.9 billion, holding 76.6% of the entire aquatic product processing industry. As costs of frozen storage, transportation, procurement, etc. climb quickly, during 2006-2012, the gross margin of frozen aquatic processing industry has been at a low level between 11%-15%.

China Aquaculture Industry Report, 2011-2012 not only focuses on the operating environment, market supply & demand, market segments, import-export trade, etc. of Chinese aquaculture industry, but also conducts a detailed analysis on aquatic products' price trends, key breeding areas, and 13 aquaculture companies.

Dalian Yiqiao Marine Seeds Co., Ltd, a leader in marine seedling cultivation in China, is primarily involved in the cultivation and marketing of sea cucumber and shrimp spat, with 2011 consolidated gross margin as high as 64.13%, towering over levels of other counterparts. It has a total of 143,000 cubic meters of rearing water bodies, including an addition of 57,000 cubic meters in 2011. The Company has its market mainly in Liaoning province, from which its revenue in 2011 swept 96.6% of the company's total revenue, but featuring a high risk for single regional management.

Homey Group and Zhangzidao Fishery Group, which are specialized in aquaculture, also enjoy relatively high consolidated gross margins, up to 22.7% and 34.1% separately in 2011. Development strategy of Homey Group is still focused on the development of sea cucumber breeding business, with catches up to 2,282.7 tons in 2011, a YoY rise of 68.59%, and sea cucumber product revenue reaching RMB420 million, sharing 48.1% of operating revenue over the same period. Moreover, in 2011, Homey also invested RMB1.09 billion to extend sea cucumber industry chain, i.e., the new 76,000-square-meter sea cucumber seedling workshop for realizing self-sufficiency in offspring seed, the new 9,800-mu (1 mu = 1/15 hectare) sea cucumber farming project to raise production, as well as the 10,000-mu artificial reef project exploitation for carrying out sea cucumber sowing breeding at deep-sea bottom.

In 2011, Zhangzidao Fishery Group achieved operating revenue of RMB2.94 billion, of which the aquaculture business occupied 44.9%, with gross margin of 57.89%. In order to further improve its competitiveness, the company is now working towards the integration of breeding, transportation and processing. In the same year, it lavished RMB1 billion for the construction of sea cucumber & abalone breeding base in South Korea; RMB170 million for building 9.7 kt/a Yongxiang Shellfish Processing Center; RMB88.75 million for launching the frozen logistics project with Japan's Chuo Gyorui and Hohsui.

There are relatively low gross margins for feed, fishing and processing enterprises, e.g., the consolidated gross margin of Guangdong Haid Group, dedicated to the aquaculture feed, was merely 9.6% in 2011. However, the capacity of Guangdong Haid Group ever grows thanks to the brisk downstream demand; in 2011, Haid acquired an 80% stake in Vietnam Pan Asia, since then into the Vietnamese aquaculture feed market.

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