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China Beer Industry Report, 2010-2012

https://marketpublishers.com/r/CF23CBBC101EN.html
Date: November 2011
Pages: 81
Price: US$ 1,900.00 (Single User License)
ID: CF23CBBC101EN

Abstracts

The beer output and sales volume of China have both seen stable growth in recent years, with the CAGR in 2007-2010 reaching 4.5%. In 2010, the beer sales volume of China reached 44.479 million kl, realizing the sales-output ratio of 99.3%. Considering the increasingly growing target consumer group as well as people’s enhanced consumption capability, the beer demand in Chinese market is expected to see moderate growth, with the targeted beer sales volume in 2012 hitting 51.48 million kl.

In terms of regional development, beer enterprises have made increased effort to develop markets in West China. For example, Yanjing built 200,000 tons of capacity in Nanchong, Sichuan Province in 2010, expanding the total capacity in the region to 300,000 tons; in August 2011, China Resources Snow lavished RMB300 million to build a plant with the capacity of 200,000 kl in Yinchuan; in August 2011, Carlsberg became the controlling shareholder of 7 beer companies under Chongqing Beer after it became the second largest shareholder of Chongqing Beer in April 2010.

In terms of competition pattern, beer enterprises are expanding their respective market share by means of acquisition and expansion in recent years. A case in point is Tsingtao, which took over Hangzhou Zijintan Brewery Company in 2011, a move to consolidate its business in Zhejiang market. In addition, the 11 expansion projects including the expansion of its No.2 plant and Shanghai plant as well as the new Shijiazhuang plant construction project will all be completed. In 2010, the sales volume of Tsingtao attained 6.35 million kl, with the market share of 14.3% (by sales volume), second only to China Resources Snow (20.9%). And the market share of Tsingtao is expected to increase to 16.8% in 2012.

In 2011-2015, beer titans will develop in different directions. Tsingtao focuses on quality and profit, while China Resources Snow is eager to change the low-end image; Anheuser-Busch InBev is bent on the brand integration, while Yanjing and Carlsberg

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seek to establish footholds in South and West China.

The report underscores China’s beer industry in the following aspects:

Market scale and prospect, including output and sales volume, overall revenue and profit;

Market features by region, including output by region these years and regional beer enterprises;

Competition pattern and development tendency;

Development of nine key homegrown enterprises, including overall operation, capacity, output and development strategy;

Development of six foreign beer enterprises in China, including M&A and development strategy.

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