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China Grape Wine Industry Report, 2012-2014

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Abstracts

Spurred by rapid growth of consumption market, China's output of grape wine climbs year after year. In 2011, grape wine output in China amounted to 1.1569 billion liters, rising 6.3% from a year earlier. From 2001 to 2011, the output of grape wine presented an AAGR of 16.5%. Under the drive of the growing production and sales volume of grape wine, the operating revenue of Chinese wine industry shows a significant development tendency. In 2011, the operating revenue of China's wine industry increased by 21.1% year-on-year to RMB38.46 billion, and during 2006-2011 with a CAGR of 24.3%.

Currently, the wine industry of China features low concentration, involving three types of wine companies. The first group consists of large grape wine breweries such as Changyu, Greatwall and Dynasty which are powerfully competitive with sound development foundation and excellent operating results; the second group refers to the numerous small-scale wine firms such as the small- and medium-sized enterprises in Yantai city, Shandong province, China, with their products focusing on low-end wines; the third group comprises some independent small-sized vintage wine enterprises. It can be seen from development trend that, Chinese grape wine industry will be dominated by several giants like Changyu, Greatwall and Dynasty and assisted by other featured wine vintages such as Grace Vineyard and Dragon Seal.

Seen from consumptive levels, the per-capita consumption of grape wine was merely 1.06 liters in China in 2011. Along with accelerated urbanization process, the improvement of disposable income of residents as well as emergence of new-generation consumer groups, there is vast room for the growth of per-capita consumption of grape wine in China.

The report highlights the followings:

Production scale, import & export, consumption, market price, operation and competition pattern of Chinese grape wine industry;

Policies on grape wine industry in China, policies on imports and exports, and influence from upstream and downstream sectors;

Forecast of Chinese grape wine industry development, including production scale, consumption trend and competition tendency of China-made wine and imported wine, etc;

Production & operation, investments and M&A, wine business and development prospects of Ten wine companies in China.

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