

Market Research Report on Chinese Grape Wine Industry, 2009

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Abstracts

In recent years, Chinese grape wine industry in the fast growth period. But the international financial crisis has affected the development of Chinese grape wine industry. In 2008, the growth speed of Chinese grape wine industry was slowed down compared with the previous years. In 2008, the yields of the grape wines in China were 698.3 thousand kiloliters, up by 5% over the previous year. The sales revenues were about 2.8 billion USD, up by 20% over the previous year.

In 2008, the imported grape wines accounted for 15% market shares of the grape wine sale revenues in Chinese market. Because of the advantages of the imported grape wines in the raw material quality and cultural contents, the high quality market was occupied by the imported products, the major imported grape wine brands circulated in Chinese market from the famous wine producing countries, including France, Italy, Spain, Portugal, Germany, America, Canada, Chile, Argentina and Australia etc, in which the bulk imported volumes from Chile, Argentina, Spain, France, Italy and America stood the front places. In 2008, the total import amounts of the bottle grape wines in China reached to 264 million USD, increased by 43.48% compared with 184 million USD in 2007. Also, the import volumes of the bulk grape wines were grown in 2008 compared with 2007.

The major market share, however, was still occupied by the medium and low quality domestic grape wines in Chinese grape wine market.

For the product structures, the whole juice grape wines accounted for the major part. The dry and the semi-dry grape wines accounted for over 50% of the total volumes, in which the dry red grape wines accounted for 80% and the dry white grape wines for 20%. The product structures of Chinese grape wines were basically reasonable.

For the brand orientation, the concept orientation of Chinese grape wine enterprises has closely followed the international mainstream, including the grape concept, year concept and producing area concept etc.

For the brand influences, Chinese local grape wine enterprises had made great accumulation in the advertisement broadcasting and public relations efforts in recent years, especially the drive forces of several large local brands, having made the product reputation of the local grape wine brands exceeding the imported ones.

The national grape wine enterprises had monopolized the regional market represented by ChangYu ChangYu Pioneer Wine Company Limited, Sino-French Joint-Venture Dynasty Winery Ltd and China Great Wall Wine Co., Ltd. ChangYu ChangYu Pioneer Wine Company Limited stood the first place in Shandong, Fujian and Guangdong etc. The comprehensive occupation rate of China Great Wall Wine Co., Ltd placed the first in South China, Southwest China, North China and Northwest China and the market share of Sino-French Joint-Venture Dynasty Winery Ltd in Shanghai exceeded 40%.

Many Chinese regional grape wine brands also developed fast: such as the Weilong and Fengshou etc in Central and South China; Suntime, Yunnan Red Wine, Shangri-La and Mogao in West China; dry red grape wines in Tonghua of Northeast China.

The sales channels of Chinese domestic grape wines can be divided into two parts: one is for the hotels and restaurants. The other is for the retail sales in the supermarkets. According to the industrial average statistics, the hotel and restaurant consumption accounts for 50% and the left volumes are in the convenience stores, specialty stores and the food stores. Because of the high expenses for entry supermarkets and the channel maintenance and individual consumption characteristics of the grape wines, some grape wine enterprises have started the electronic commercial transaction platform construction. The self-built chain terminals receive more and more popular. The market promotion of the imported grape wines adapts the high consumption group orientation.

For the price systems, the general price of Chinese grape wine market is rising. With the popularity of the grape wine cultures and the enhancement of the consumption awareness and capacity, the prices of the mainstream products in Chinese grape wine market have improved from 2 to 5 USD per bottle in the previous years to 3 to 7 USD per bottle at present.

As for the quality level standards, the year wines had been restrained by the new international standard since the implementation of Chinese standards on the new grape wines in the beginning of 2008. In order to cast to the market demands, the enterprises put new product quality level standards; as a result, the first domestic comprehensive quality level systems were born represented by ChangYu, including six crucial influence links on the grape wines, such as the grape gardens, the raw materials, the brewing technologies, aging in oak barrels, mixing and bottle storage. ChangYu divided the grape wines into four levels according to the quality like the master level, reserve level, special level and preferred level. Another domestic grape wine giant, China Great Wall Wine Co., Ltd, put the level standards according to the producing areas.

With several-year market culture, the culture of drinking health and fashion grape wines has been accepted by Chinese consumers. The demands for the grape wines are accelerated gradually in China. Although the consumption volumes of the grape wines per capita in China vary from the world's average level, the total consumption volumes keep rising in Chinese market.

In the beginning of 2008, Hong Kong government announced to cancel the import duties of the grape wines, which attracted the manufacturers, investors and dealers to invest in Chinese superior quality grape wines. The policy also was favorable for more high quality grape wines to enter Chinese market through Hong Kong. The imported grape wines will strike the domestic grape wines in price, quality and diversity and stimulate the enhancement of the general consumption level and volumes of the grape wines in China.

The author made a profound investigation into Chinese grape wine manufacturers, the sales channels and the consumers' behaviors and then wrote this report citing abundant valuable second –hand information.

More following information can be obtained in this report:

- Present Situation of Chinese Grape Wine Manufacture
- Imports and Exports of Chinese Grape Wine Industry
- Consumers' Behavior of Chinese Grape Wine
- Sales Channels of Chinese Grape Wine
- Major Enterprises and Their Operations of Chinese Grape Wine
- Development Environments of Chinese Grape Wine Industry
- Influences of International Financial Crisis on Chinese Grape Wine Industry
- Competitions of the Imported Grape Wines in Chinese Market
- Prediction on the Development of Chinese Grape Wine Industry

Contents

1 OVERVIEW ON THE DEVELOPMENT OF CHINESE GRAPE WINE INDUSTRY

1.1 Development Environments of Chinese Grape Wine Industry

1.1.1 Macro-economic Environment

1.1.2 Policy Environment

1.1.3 Consumption Environment

1.2 Operations of Chinese Grape Wine Industry

1.2.1 Position in the Alcoholic Drink Industry

1.2.2 General Operations

1.3 Sales Channels of Chinese Grape Wine Industry

1.3.1 Domestic Brands

1.3.2 Foreign Brands

2 SUPPLIES AND DEMANDS OF CHINESE GRAPE WINE INDUSTRY

2.1 Supplies of Chinese Grape Wine Industry

2.1.1 Yield Capacity

2.1.2 Sub-regions

2.1.3 Product Structures

2.1.4 Supply Trends

2.2 Demands of Chinese Grape Wine Industry

2.2.1 Overview on the Demands

2.2.2 Demands Structures

2.2.3 Demand Trends

2.3 Imports and Exports of Chinese Grape Wine Industry

2.3.1 Imports

2.3.2 Exports

2.3.3 Import and Export Trends

2.4 Prices of the Grape Wines in Chinese Market

2.4.1 Price Trends, 2008

2.4.2 Factors Affecting the Price

2.4.3 Prediction on the Price, 2009

3 COMPETITIONS OF CHINESE GRAPE WINE INDUSTRY

3.1 Overview on the Competitions of Chinese Grape Wine Industry

- 3.1.1 Regional Competitions
- 3.1.2 Brand Competitions
- 3.1.3 Competitions between the Domestic and Foreign Market
- 3.2 Factors Affecting the Competition Success and Failure in Chinese Grape Wine Industry
 - 3.2.1 Raw Materials
 - 3.2.2 Market Strategies
 - 3.2.3 Other Factors
- 3.3 Competitions of the Imported Products in Chinese Grape Wine Industry
 - 3.3.1 Advantages
 - 3.3.2 Disadvantages
- 3.4 Prediction on the Competition Trends
- 3.5 Recommendations for the Competition Strategies in Chinese Grape Wine Industry

4 REGIONAL MARKETS OF CHINESE GRAPE WINE INDUSTRY

- 4.1 Grape Wine Market in North China
 - 4.1.1 Overview
 - 4.1.2 Typical Market-Beijing
- 4.2 Grape Wine Market in Northeast China
 - 4.2.1 Overview
 - 4.2.2 Typical Market-Shenyang
- 4.3 Grape Wine Market in Central China
 - 4.3.1 Overview
 - 4.3.2 Typical Market-Zhengzhou
- 4.4 Grape Wine Market in East China
 - 4.4.1 Overview
 - 4.4.2 Typical Market-Shanghai
- 4.5 Grape Wine Market in South China
 - 4.5.1 Overview
 - 4.5.2 Typical Market-Guangzhou
- 4.6 Grape Wine Market in Southwest China
 - 4.6.1 Overview
 - 4.6.2 Typical Market-Chengdu
- 4.7 Grape Wine Market in Northwest China
 - 4.7.1 Overview
 - 4.7.2 Typical Market-Xi'an

5 MAJOR ENTERPRISES OF CHINESE GRAPE WINE INDUSTRY

- 5.1 ChangYu Pioneer Wine Company Limited
 - 5.1.1 Company Profiles
 - 5.1.2 Operations
 - 5.1.3 Development Strategies
- 5.2 Sino-French Joint-Venture Dynasty Winery Ltd
 - 5.2.1 Company Profiles
 - 5.2.2 Operations
 - 5.2.3 Development Strategies
- 5.3 Yantai Weilong Grape Wine Co., Ltd
- 5.4 Yantai COFCO Winery Co., Ltd
- 5.5 China Great Wall Wine Co., Ltd
- 5.6 Beijing Fengshou Wine Co., Ltd
- 5.7 Suntime International Wine Co., Ltd

6 MERGERS AND ACQUISITIONS IN CHINESE GRAPE WINE INDUSTRY

- 6.1 Situation of the Mergers and Acquisitions in Chinese Grape Wine Industry
- 6.2 Cases of Mergers and Acquisitions in Chinese Grape Wine Industry
- 6.3 Trends of Mergers and Acquisitions in Chinese Grape Wine Industry

7 HOT EVENTS IN CHINESE GRAPE WINE INDUSTRY

- 7.1 Price Growth of Chinese Grape Wine Enterprises
- 7.2 Domestic Grape Wines Stepping into “Thousand Yuan Age”
- 7.3 Annual Competition in the Grape Wines
- 7.4 Vineyard Bringing High Quality Road for the Grape Wines
- 7.5 Raw Material Wars among the Grape Wine Enterprises
- 7.6 Imported Grape Wines Distributed in Chinese Market
- 7.7 Development of the Regional Grape Wine Enterprises
- 7.8 Cabernet Brand Competitions

8 FACTORS AFFECTING THE DEVELOPMENT OF CHINESE GRAPE WINE INDUSTRY, 2009-2010

- 8.1 Government Policies Affecting the Development of Chinese Grape Wine Industry
- 8.2 Consumers’ Behavior Affecting the Development of Chinese Grape Wine Industry
- 8.3 Influences of International Financial Crisis on Chinese Grape Wine Industry
 - 8.3.1 Short Term Influences

8.3.2 Medium and Long Term Influences

9 INVESTMENTS AND DEVELOPMENT OF CHINESE GRAPE WINE INDUSTRY

9.1 Development Ventures of Chinese Grape Wine Industry

9.1.1 Policy Ventures

9.1.2 Raw Material Ventures

9.1.3 Market Ventures

9.1.4 Other Ventures

9.1.5 Recommendations for the Venture Aversion

9.2 Development Trends of Chinese Grape Wine Industry

9.2.1 Prediction on the Market Capacity

9.2.2 Prediction on the Product Trends

9.2.3 Prediction on the Competition Trends

9.3 Investment Opportunities in Chinese Grape Wine Industry

9.3.1 Technology Opportunities

9.3.2 Channel Opportunities

9.3.3 Other Opportunities

9.4 Recommendations for the Investments and Development of Chinese Grape Wine Industry

Selected Charts

SELECTED CHARTS

- Chart Yields of Chinese Grape Wines, 2003-2008
- Chart Sales Revenues of Chinese Grape Wine Market, 2004-2008
- Chart Imported Volumes of the Bulk Grape Wine in China, 2004-2008
- Chart Imported Volumes of the Bottle Grape Wine in China, 2004-2008
- Chart Sales Channels of Chinese Grape Wines
- Chart Major Marketing Strategies in Chinese Grape Wine Market
- Chart Major Import Countries of Chinese Grape Wines
- Chart Operations of ChangYu Pioneer Wine Company Limited, 2004-2008
- Chart Operations of Sino-French Joint-Venture Dynasty Winery Ltd , 2004-2008
- Chart Major Merger and Acquisition vents in Chinese Grape Wine Industry, 2004-2008
- Chart Top Ten Chinese Grape Wine Enterprises
- Chart Retail Prices of the Major Domestic Grape Wines in Shanghai, 2008
- Chart Retail Prices of the Major Domestic Grape Wines in Beijing, 2008
- Chart Retail Prices of the Major Domestic Grape Wines in Guangzhou, 2008
- Chart Consumers' Characteristics of Chinese Grape Wines
- Chart New Products of Chinese Grape Wine Industry, 2008-2009
- Chart Prediction on the Sales Revenues of Chinese Grape Wine Market, 2009-2012

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