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# Research Report on China's Soft Drink Manufacturing Industry, 2013-2017

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## Abstracts

In China, soft drinks refer to those natural or artificial beverages with the alcohol content less than 0.5% in the total volume. Small amount of alcohol may be contained in a soft drink, but such alcohol is the ethyl alcohol which is used in dissolving essences, flavorings and pigments, or the by-products of lactic acid beverages.

With the rapid increase in Chinese people's living standard and consumption capability, soft drink industry has entered the rapid growth era. Since soft drink products enjoy great popularity in China, the market demand is huge. Currently, there are various types of soft drinks sold in the market with many strong competitors.

In 2012, the total output volume of China soft drinks is 130.2401 million tons, increasing by 10.73% YOY. From 2000 to 2012, the output volume of China soft drink industry increased by 7 times, with a CAGR of 20.7%, which is far higher than the growth rate of GDP, presenting a well development competence.

When the output volume increases, the varieties of China soft drinks also increase to provide more options for consumers. Among all varieties of soft drinks, carbonated beverages take up the largest proportion of China soft drink industry, while the proportion of natural mineral water in soft drink industry increases continuously. At present, carbonated beverages, bottled drinking water, fruit and vegetable drinks and tea drinks have become the four major categories of soft drinks in China.

In 2012, the output volume of carbonated beverages was 13.1129 million tons, decreasing by 18.38% YOY. The output volume of fruit juices and vegetable juices was 22.2917 million tons, increasing by 16.09%. The output volume of bottled drinking water amounted to 55.6278 million tons, up by 16.16% YOY. And the output volume of other

drinks reached 39.2077 million tons, increasing by 13.76% YOY.

China soft drink market can be divided into several major market segments, including carbonated beverages, fruit and vegetable beverages, bottled drinking water, tea drinks, protein beverages and other drinks. For a long period, bottled drinking water and carbonated beverages have accounted for the largest proportion of the market, followed by protein beverages and fruit and vegetable beverages. Tea drinks have also increased their market share and created a huge consumption market. However, with the development of social economy, the improvement of people's living standard and the formulation of healthy consumption concept, the competition structure of soft drink market will encounter a great change. Influenced by the emerging healthy consumption concept, it can be predicted that the proportion of carbonated beverages in the market will decline, while healthy beverages, such as tea drinks, protein beverages and fruit and vegetable juices, will become the mainstream of the market in the near future. However, consumers of carbonated beverages are mainly between 16 and 25 years old, mainly teenagers. They worship fashion instead of nutrition. Since such young consumer group is unlikely to diminish, there is a huge market demand for carbonated beverages. Therefore, it will take a long-term process to lower the carbonated beverage market.

In recent years, functional drinks have become the highlight in China soft drink market. It indicates that China functional drink market has been established after a period of market development. At present, China functional drinks mainly include sport drinks (with Mizone and Gatorade as representatives), energy drinks (with Red Bull and Lipovitan as representatives), and vegetable protein drinks (with Jiaduobao and Wong Lo Kat as representatives). There is a huge market potential for China functional drinks.

As a sun-rising industry in China, soft drink industry enjoys consumption per capita much lower than that of developed countries. Rural residents spend much less on soft drinks. Based on the huge domestic market, there is an enormous development space for China soft drink industry. With high degree of marketization, China soft drink industry has attracted many international drink magnates to establish their businesses in China, which will result in fierce market competition. Besides, confronted with the new situation, the competition of China soft drink industry has been transferred from product competition to industry chain competition. In this sense, the marketing model of soft drink enterprises has also been transferred from brand operation into channel model and structure and channel management. Channel resources, especially terminal resources have become the focus of competition.

It is estimated by CRI that the output volume of China soft drinks will maintain a growth rate of over 8%, which will be higher than that of GDP.

Through this report, the readers can acquire the following information:

- Supply and Demand Status of China Soft Drink Industry
- Operation Status of Sub-industries of China Soft Drink Industry
- Competition Status of China Soft Drink Industry
- Major Soft Drink Manufacturing Enterprises in China
- Influencing Factors and Development Trend of Soft Drink Industry
- Investment and Development Recommendations for Soft Drink Industry

The Following Enterprises and People are proposed to purchase this report:

- Soft Drink Manufacturing Enterprises
- Upstream Soft Drink Enterprises, Such as Essence Manufacturing Enterprises, Pigment Manufacturing Enterprises, and Enterprises in Charge of Packing
- Soft Drink Distributing Enterprises
- Investors and Research Institutes Concerned About Soft Drink Industry

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## COMPANIES MENTIONED

Hangzhou Wahaha Group Co., Ltd.
Master Kong Drink Holdings Co., Ltd.
VV Group Co., Ltd.
Uni-president (China) Investment Co., Ltd.
Coca-Cola Bottle Manufacturing (Dongguan) Co., Ltd.
Xiamen Yinlu Foods Co., Ltd.
Red Bull Vitamin Drink Co., Ltd.
Jiangxi Runtian Beverage Co., Ltd.
Nongfu Spring Co., Ltd.
Beijing Huiyuan Food and Beverage Group Co., Ltd.

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