

Research Report on Chinese Beer Industry in 2009

<https://marketpublishers.com/r/R26BE089F00EN.html>

Date: July 2009

Pages: 50

Price: US\$ 1,621.50 (Single User License)

ID: R26BE089F00EN

Abstracts

China is a large beer production and consumption country. By the end of 2008, the output of Chinese beer had ranked first in the world for many years. In 2008, affected by the increase in price of raw materials and the financial crisis, etc, the total output of China' beer was 41.03 million tons with an increase of only 5.46% YOY, which was the lowest in recent years.

The output of Chinese beer has been the world first for many years and China is one of the regions where beer markets grow fastest in the world. At present, Chinese beer industry is still in the mid and late integration phase. In 2009, although it is affected by the financial crisis, the competition in beer market is still violent. Beer breweries have a relatively fierce competition in brands, markets and channels, etc.

Judging from Chinese beer market, after a series of M & A, Tsingtao, China Resources, Yanjing beer companies have established the first rank in this field. Zhujiang, Harbin and Kingstar beers are forming the second rank. Currently Chinese beer market is in regional distribution, which means that every market is occupied by certain beer companies. For example, China Resources and Harbin beers occupy the Northeast China; Yanjing beer occupies North China; Tsingtao beer occupies East China; Chongqing beer occupies the West; Zhujiang beer occupies South China; Kingstar beer occupies Central China. Tsingtao, Yanjing and China Resources beers have formed a stalemate in the markets of the Northeast, North China and the Southwest. Although there is about 40 % of production capacity surplus in Chinese beer industry, and the oversupply has caused malignant price wars and unfair competition, the scale of Chinese beer manufacturers and brands have been generally confirmed. These beer giants' positions in recent time will not change. In the future, Chinese main large-scale beer enterprises will take advantage of capital and scales to compete in market. Their competition will be more direct and come to the surface. With the increasing efforts of integration in Chinese beer market, main beer manufacturers will not only compete

directly in price and market regions, but also in more directions and higher levels. It can be estimated that in the future 3 to 5 years, after the further scale integration, Chinese beer industry will form the domestic beer market which is monopolized by Tsingtao Brewery Company Limited, Beijing Yanjing Beer Group Corporation, China Resources Snow Breweries Co., Ltd, Zhujiang Brewery Co., Ltd, Harbin brewing (Shen Yang) Co., Ltd, Chongqing Beer (Group) Co., Ltd, Kingstar Beer (Group) Corporation and other four large-scale beer manufacturers.

Chinese beer industry is developing towards monopolistic competition and oligarch competition. Therefore, in the future, the intra-industry M & A will continue and the scale of M & A will be larger and larger. The upsurge of M & A will accelerate the quick development of scales and collectivization in Chinese beer industry. Then, the number of enterprises will decline; the affiliated enterprises of Tsingtao Brewery Company Limited, Beijing Yanjing Beer Group Corporation and China Resources Breweries Co., Ltd will increase, and the yield capacity and the yearly capacity will increase. Meanwhile, those second-rank groups like Zhujiang Brewery Co., Ltd, Kingstar Beer (Group) Corporation and Harbin brewing (Shen Yang) Co., Ltd will expand rapidly and their scales will expand soon. The degree of industry concentration will be more and more strengthened.

It is estimated that in the future 10 years, 50% of the increase amount of the global beer will come from Chinese market. At present, nearly every local Chinese beer brewery has foreign investment directly or indirectly. The world top 10 beer breweries all invest in China.

By reading this report, readers can gain the more information:

- Current Situation of the Development of Chinese Beer Industry
- Situation of Chinese Beer Market in Competition
- Main Enterprises and Their Operational Status in Chinese Beer Market
- Analysis on M & A in Chinese Beer Market
- Prediction on the Development of Chinese Beer Market

Following are suggested to buy the report:

- Beer Breweries
- Beer Traders
- Traders of Beer Materials like Barley
- Investors Paying Attention to Chinese Beer Market

- Enterprises engaging in M & A in Chinese Beer Market
- Institutions Paying Attention to Chinese Beer Market
- Other Persons Paying Attention to Chinese Beer Market

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