

Research Report on Chinese Wine Industry, 2012

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Abstracts

In recent years, China's consumption market of wine quickly heats up. In China, the low to medium-end wine belongs to consumption goods, while the high-end wine already has investment property. Since the injection of China's capital, wine which originally is not often used for investment is given an investment property, resulting in an increasing demand for high-end wine in China. China lacks domestic high-end wine products and the production of low to medium-end products is also limited. In 2011, the total output of China's wine industry was 1.157 million kiloliters, with an increase of 13.0% YOY. Most of them were low-end products with market retail price below CNY 100 (750ml).

In recent years, the import volume of China's wine continues to rise sharply. On one hand, the oversupply situation of the world's wine since 1996 (basically 3 million kiloliters to 5 million kiloliters) is not greatly changed. In recent years, with the continuous growth of China's wine consumption market, the international giants successively seize the Chinese market. On the other hand, since 2005, the tariff rate of China's imported bottled wine falls from 43% to 14% and the comprehensive tax rate decreases from 85.9% to 48.2%; the tariff rate of imported bulk wine falls from 43% to 20% and the comprehensive tax rate decreases from 85.9% to 56%. The substantial decline of tariffs makes the number of imported wine grow rapidly.

In 2011, the total import volume of China's wine was 361.6 thousand kiloliters, with an increase of 27.6%YOY and the import amount was USD 1.393 billion, with an increase of 80.9% YOY. Among it, the import volume of bottled wine (below 2L) was 241.4 thousand kiloliters, with an increase of 65% YOY; the import amount was USD 1.273 billion, with an increase of 94.05% YOY; the import volume of bulk wine (above 2L) was 120.2 million kiloliters, with a decrease of 12.32% YOY; the import amount was USD 120 million, with a decrease of 20% YOY. In 2009, the import volume of China's bottled wine was more than that of the bulk wine for the first time. In the short two years, the import volume of bottled wine was double that of the bulk wine and the import amount

was over 10 times that of the bulk wine, indicating that the market of China's imported wine is transferring from low-end to medium and high-end.

The import volume of China's wine is significantly larger than the growth of the domestic wine production in the same period. It is expected that import volume will continue to rise in the future. In the face of the strong impact of imported wine, for China's domestic wine enterprises, on one hand, China's wine market has a rapid development and there are many market opportunities. However, at the same time, there are increasing pressure for its survival and increasingly fierce market competition. In addition to the traditional wine producing countries like France, Italy, Chile, etc., the wine products of Australia, the United States and other countries also step into the Chinese market in large quantities.

It is expected that in the next few years, the Chinese wine market will continue to maintain rapid growth, and the growth rate of the imported wine will be faster than the overall market. For the overseas wine manufacturers and traders, there are many opportunities in the Chinese market.

More following information can be acquired through this report:

Production and Consumption of China's Wine Market

Import and Export of China's Wine

Investment of Wine

Competition in China's Wine Market

Key Enterprises of China's Wine Industry

Development Trend of China's Wine Industry

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