



# China Grape Wine Industry Report, 2010-2011

Jun. 2011

## ***This report***

- ◆ Analyzes the operation, export & import, consumption characteristics, brand structure and marketing channel of China grape wine industry.
- ◆ Focuses on the regional market of China grape wine industry.
- ◆ Highlights the operation of key enterprises in China.

---

Please visit our website to order this report and find more information about other titles at [www.researchinchina.com](http://www.researchinchina.com)

## **Related Products**

China Sugar Manufacturing Industry Report, 2010

China Yeast Industry Report, 2010

China Beer Industry Report, 2009-2010

China Drinking Water Industry Survey Report, 2010

China Health Food Industry Report, 2010

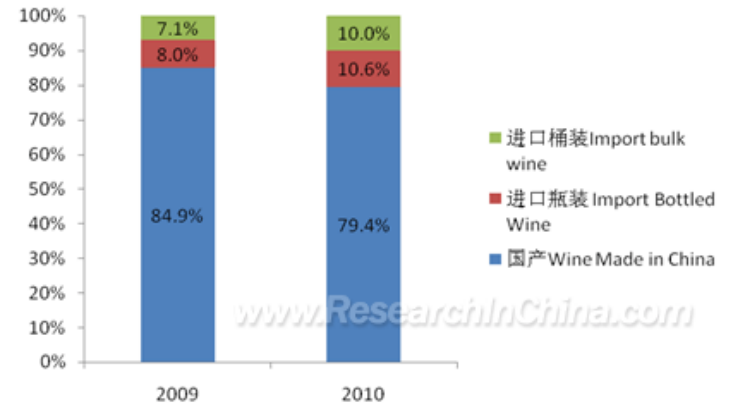
China Edible Vegetable Oil Industry Report, 2010-2011

## Abstract

Benefiting from the rapid progress of the consumption market, the output of grape wine in China has been on the rise year by year. It totaled 1.089 million kiloliters in 2010, up 13.4%YoY. On a provincial basis, Shandong enjoyed the lion's share of 34.4% by 0.375 million kiloliters.

The huge potentiality of Chinese grape wine market has attracted foreign brands, with the proportion of imported grape wines rising from 15.1% in 2009 to 20.6% in 2010. The import origins mainly consist of such famous production areas as France and Australia. Bottled wines are mostly from France and Australia, occupying respectively 46.3% and 16.2% of the total import volume of bottled wines; bulk ones mainly from Chile, Spain, and Australia, with the respective proportion of 32.9%, 27.5%, and 23.8% of the total import volume of barreled wines.

## Output Proportions of Domestic and Overseas Grape Wines in Chinese Market, 2009-2010



Source: ResearchInChina

China's high-end grape wine market features robust demand, so the overseas high-end grape wine brands have successively tapped into Chinese market by means of joint venture, cooperation, agents, etc. Yet the pioneer foreign brands like Custer have transferred to self-management model from the complete reliance on Chinese agents.

Exposed to the impact from overseas grape wine brands, the local magnates including Changyu, Greatwall, and Dynasty have learned from the foreign chateaus and increased the input in high-end grape wines so as to maintain the leading positions within the industry.

Changyu takes the lead in cooperation with overseas brands for chateau construction. The company has raised its overall gross margin via the proportion increase of such high-grade products as Century-old Cellar and Chateau Wine. In Q1 2011, Changyu acquired the gross margin of 74.01%, up 4 percentage points year on year; and the top-grade series contributed 25%-28% to its revenue. Along with the operation of three big chateaus (Xinjiang, Ningxia, and Xi'an) in west region, the high-grade grape wine capacity of Changyu will break through 10 kilotons in 2012.

Greatwall, the grape wine enterprise under COFCO, boasts powerful capitals. In 2011, it started building grape wine production area in Ningxia after Shacheng, Yantai, and Changli; meanwhile, it has practiced the M&A of overseas famous chateaus in order to open the international market. It acquired Bisquertr Vineyard in 2010.

Fueled by the rising industry, some medium-sized wine enterprises have also vigorously developed wine business. In 2010, CITIC Guoan Wine divested itself of the capital loss and focused on the main business of wines. In Q1 2011, its revenue substantially climbed 73.57%. China Tontine Wines Group plans to complete the chateau in 2011 and officially launch the chateau wine in H1 2012. Tonhwa Winery has projected the assets reorganization with the parent company of Yunnan Red and will implement the trans-regional collaboration for complementary advantages in grape wine sector.

### 1 Definition and Classification of Grape Wine

### 2 Overview of China Grape Wine Industry

#### 2.1 Operation

##### 2.1.1 Output in Rapid Growth

##### 2.1.2 Stable Rise of Industrial Profit

#### 2.2 Export & Import

##### 2.2.1 Import Volume on the Rise

##### 2.2.2 Export Volume on the Decline

#### 2.3 Consumption Characteristics

##### 2.3.1 Consumption Upgrading

##### 2.3.2 Consumption Area Expansion to Second & Third-tier Markets

#### 2.4 Brand Structure and Marketing Channel

#### 2.5 Chateau Distribution of Foreign Capital

### 3 Competition Pattern

### 4 Regional Market

#### 4.1 Main Producing Area and Distribution

#### 4.2 Jilin, Liaoning and Heilongjiang

#### 4.3 Beijing, Tianjin and Shandong

#### 4.4 Hebei, Shaanxi and Inner Mongolia

#### 4.5 Henan and Hunan

#### 4.6 Gansu, Ningxia and Xinjiang

#### 4.7 Southwest Region

### 5 Key Companies

#### 5.1 Yantai Changyu

##### 5.1.1 Profile

##### 5.1.2 Operation

##### 5.1.3 Development Strategy

#### 5.2 COFCO Greatwall Wine

##### 5.2.1 Profile

##### 5.2.2 Operation

##### 5.2.3 Global Extension of Industry Chain

#### 5.3 COFCO Yantai Wine

##### 5.3.1 Profile

##### 5.3.2 Operation

##### 5.3.3 Development Strategy

#### 5.4 COFCO Huaxia Wine

##### 5.4.1 Profile

##### 5.4.2 Operation

#### 5.5 Sino French Joint Venture Dynasty

##### 5.5.1 Profile

##### 5.5.2 Operation

##### 5.5.3 Marketing Channel Improvement

#### 5.6 Tonhwa Winery

##### 5.6.1 Profile

##### 5.6.2 Operation

##### 5.6.3 Development Strategy

#### 5.7 CITIC Guoan Wine

##### 5.7.1 Profile

##### 5.7.2 Operation

##### 5.7.3 Development Strategy

#### 5.8 China Tontine Wines Group

##### 5.8.1 Profile

##### 5.8.2 Operation

##### 5.8.3 Development Strategy

#### 5.9 Yunnan Red

##### 5.9.1 Profile

##### 5.9.2 Operation

##### 5.9.3 Reorganization

#### 5.10 Yantai Weilong

##### 5.10.1 Profile

##### 5.10.2 Operation

#### 5.11 Beijing Fengshou Wine

##### 5.11.1 Profile

##### 5.11.2 Operation

#### 5.12 Mogao

##### 5.12.1 Profile

##### 5.12.2 Operation

##### 5.12.3 Development Strategy

#### 5.13 Yantai Baiyanghe Winery

##### 5.13.1 Profile

##### 5.13.2 Operation

#### 5.14 Beijing Dragon Seal Winery

##### 5.14.1 Profile

##### 5.14.2 Operation

#### 5.15 Zixuan Wine

##### 5.15.1 Profile

##### 5.15.2 Operation

### 6 Forecast

- Classification of Grape Wine
- Grape Wine Output and YoY Growth in China, 2007-Apr. 2011
- Grape Wine Output of China by Region, 2010
- Operating Indices of China Grape Wine Industry, 1998-2010
- Operating Income and Total Profit of China Grape Wine Manufacturing Industry, 2007-2011Q1
- Import Volume and Value of Grape Wine ( $\leq 2L$  vessel) in China, 2008-Apr. 2011
- Import Volume and Value of Grape Wine ( $> 2L$  vessel) in China, 2008-Apr. 2011
- Import Origins of Grape Wine ( $\leq 2L$  vessel) in China by Import Volume, 2010
- Import Origins of Grape Wine ( $> 2L$  vessel) in China by Import Volume, 2010
- Export Volume and Value of Grape Wine ( $\leq 2L$  vessel) in China, 2008-Apr. 2011
- Export Volume and Value of Grape Wine ( $> 2L$  vessel) in China, 2008-Apr. 2011
- Grape Wine Consumption in China, 2008-Apr. 2011
- Marketing Channel Comparison among Changyu, Greatwall and Dynasty
- From Agent to Self-management of Custer
- Proportions of Grape Wine Both Home & Abroad by Volume, 2009-2010
- Revenue and Proportions of Key Companies in China, 2010
- Gross Margin of Key Enterprises, 2010
- Main Growing Regions of Grape Grape in China
- Grape Wine Output of Heilongjiang, Jilin and Liaoning, 2007-Apr. 2011
- Grape Wine Output of Beijing, Tianjin and Shandong, 2007-Apr. 2011
- Grape Wine Output of Hebei, Shaanxi and Inner Mongolia, 2007-Apr. 2011
- Grape Wine Output of Henan and Hunan, 2007-Apr. 2011
- Grape Wine Output of Gansu, Ningxia and Xinjiang, 2007-Apr. 2011
- Grape Wine Output of Yunnan, 2007-Apr. 2011
- Changyu Product Mix

- Operating Income and Net Income of Changyu, 2007-2011Q1
- Revenue Growth of Changyu by Product, 2011Q1
- Gross Margin of Changyu by Product, 2008-2010
- Operating Income and Proportion of Changyu by Product, 2010
- Total Assets, Operating Income and Total Profit of COFCO Greatwall Wine, 2008-2009
- Total Assets, Operating Income and Total Profit of COFCO Yantai Wine, 2008-2009
- Total Assets, Operating Income and Total Profit of COFCO Huaxia Wine, 2008-2009
- Operating Income, Gross Profit and Gross Margin of Sino French Joint Venture Dynasty Winery, 2009-2010
- Operating Income and Net Income of Tonhwa Winery, 2008-Mar. 2011
- Gross Margin of Tonhwa Winery, 2007-2010
- Operating Income and Proportion of Tonhwa Winery by Region, 2010
- Operating Income and Net Income of CITIC Guoan Wine, 2008-2011Q1
- Operating Income and Gross Margin of CITIC Guoan Wine by Product, 2010
- New Products of Tontine Wines, 2010
- Operating Income and Net Income of Tontine Wines, 2009-2010
- Operating Income and Proportion of Tontine Wines by Region, 2009-2010
- Total Assets, Operating Income and Total Profit of Yunnan Red, 2008-2009
- Total Assets, Operating Income and Total Profit of Yantai Weilong, 2008-2009
- Total Assets, Operating Income and Total Profit of Beijing Fengshou Wine, 2008-2009
- Operating Income and Net Income of Mogao, 2008-2011Q1
- Operating Income and Gross Margin of Mogao by Product, 2010
- Total Assets, Operating Income and Total Profit of Yantai Baiyanghe Winery, 2008-2009
- Total Assets, Operating Income and Total Profit of Beijing Dragon Seal Winery, 2008-2009
- Total Assets, Operating Income and Total Profit of Zixuan Wine, 2008-2009
- Grape Wine Output in China, 2009-2015E
- Grape Wine Consumption in China, 2009-2015E

**You can place your order in the following alternative ways:**

1. Order online at [www.researchinchina.com](http://www.researchinchina.com)
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: [report@researchinchina.com](mailto:report@researchinchina.com)
4. Phone us at +86 10 82600828/ 82600893

<b>Party A:</b>			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

<b>Party B:</b>			
Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
Address:	Room 1008, A2, Tower A, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080		
Contact Person:	Liao Yan	Phone:	86-10-82600828
E-mail:	report@researchinchina.com	Fax:	86-10-82601570
Bank details:	Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng, Landianchang, Haidian District, Beijing Bank Account No #: 110060668012015061217 Routing No #: 332906 Bank SWIFT Code: COMMCNSHBJG		

Title	Format	Cost
<i>Total</i>		

**Choose type of format**

- Hard copy .....1400 USD
- PDF (Single user license) .....1300 USD
- PDF (Enterprisewide license).....2000 USD

**※ Reports will be dispatched immediately once full payment has been received.**  
**Payment may be made by wire transfer or credit card via Paypal.**