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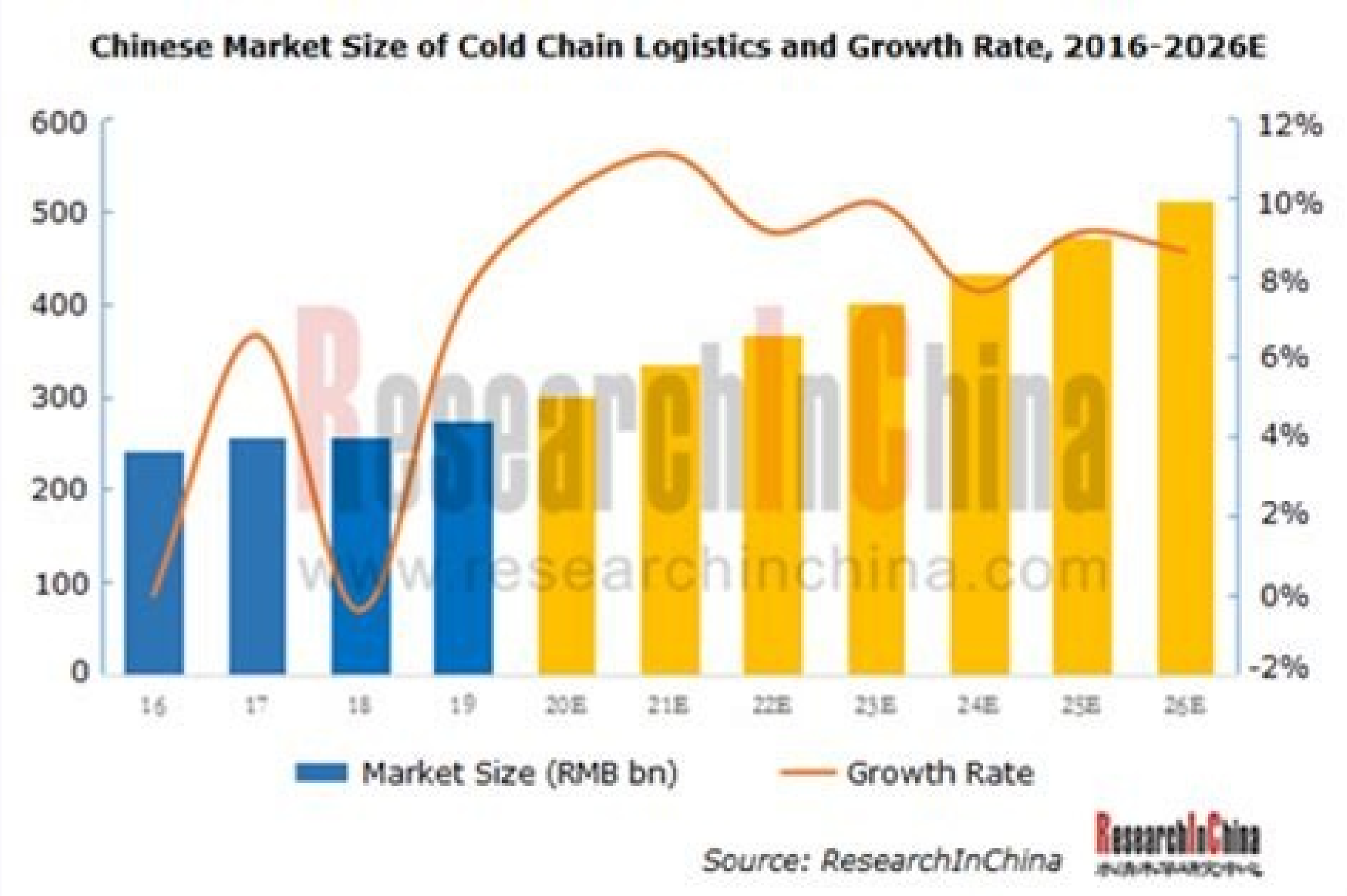
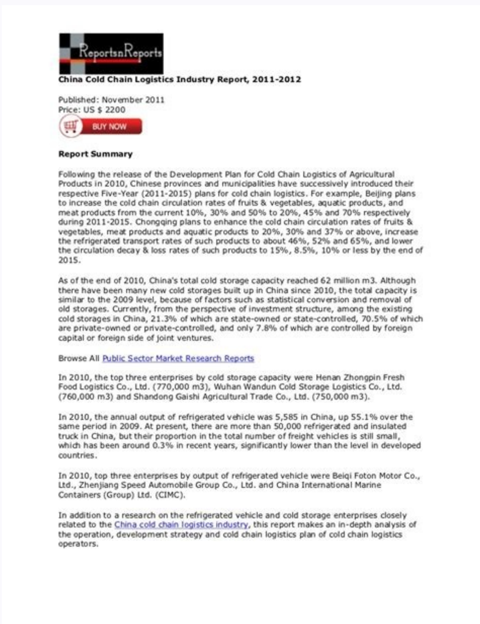
China cold chain logistics industry report





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China Cold Chain Logistics Industry Report, 2011-2012

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Report Summary

Following the release of the Development Plan for Cold Chain Logistics of Agricultural Products in 2010, Chinese provinces and municipalities have successively introduced their respective Five-Year (2011-2015) plans for cold chain logistics. For example, Beijing plans to increase the cold chain circulation rates of fruits & vegetables, aquatic products, and meat products from the current 10%, 30% and 50% to 20%, 45% and 70% respectively during 2011-2015. Chongqing plans to enhance the cold chain circulation rates of fruits & vegetables, meat products and aquatic products to 20%, 30% and 37% or above, increase the refrigerated transport rates of such products to about 46%, 52% and 65%, and lower the circulation decay & loss rates of such products to 15%, 8.5%, 10% or less by the end of 2015.

As of the end of 2010, China's total cold storage capacity reached 62 million m3. Although there have been many new cold storages built up in China since 2010, the total capacity is similar to the 2009 level, because of factors such as statistical conversion and removal of old storages. Currently, from the perspective of investment structure, among the existing cold storages in China, 21.3% of which are state-owned or state-controlled, 70.5% of which are private-owned or private-controlled, and only 7.8% of which are controlled by foreign capital or foreign side of joint ventures.

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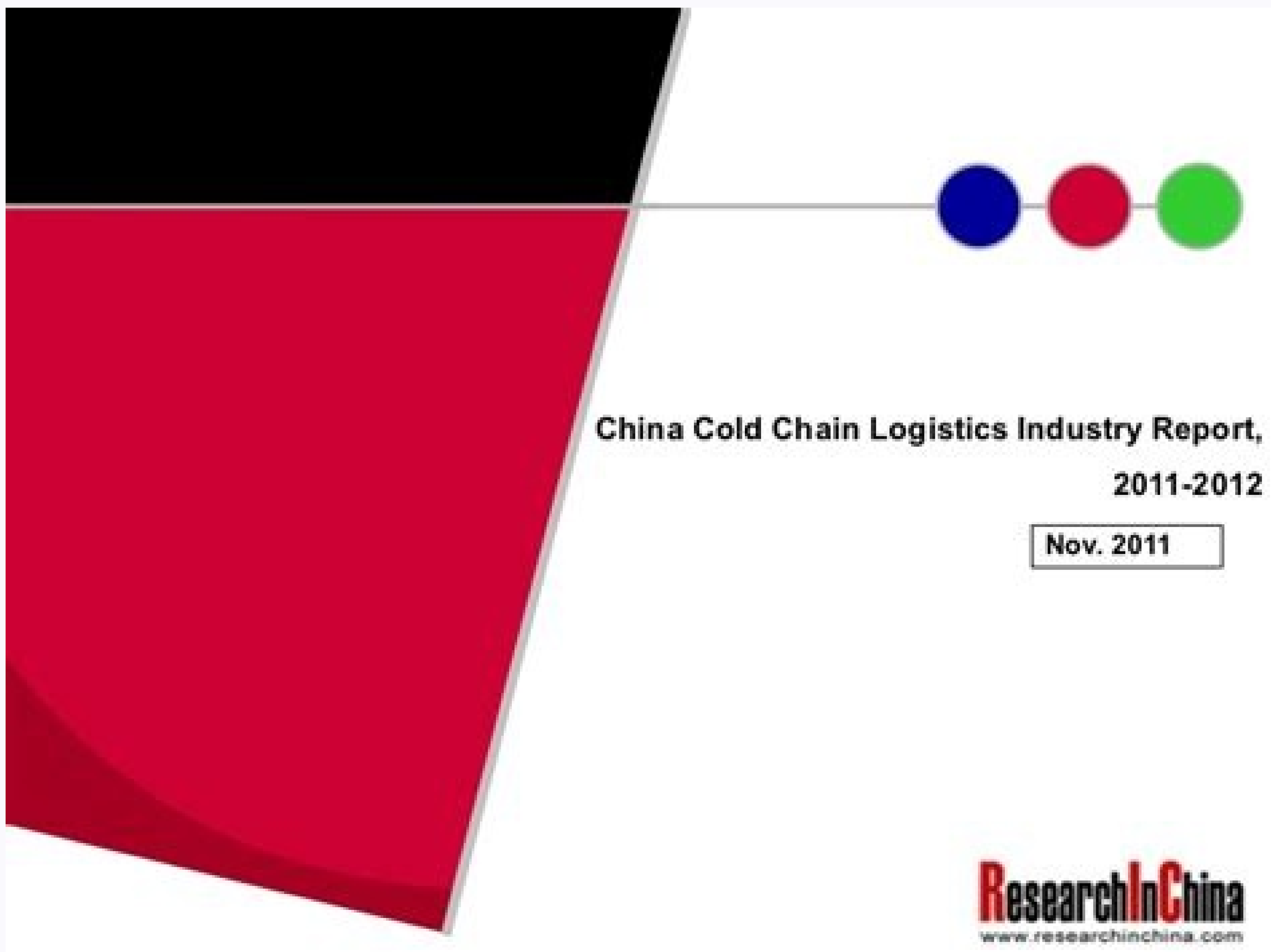
In 2010, the top three enterprises by cold storage capacity were Henan Zhongpin Fresh Food Logistics Co., Ltd. (770,000 m3), Wuhan Wandun Cold Storage Logistics Co., Ltd. (760,000 m3) and Shandong Gaishi Agricultural Trade Co., Ltd. (750,000 m3).

In 2010, the annual output of refrigerated vehicle was 5,585 in China, up 55.1% over the same period in 2009. At present, there are more than 50,000 refrigerated and insulated truck in China, but their proportion in the total number of freight vehicles is still small, which has been around 0.3% in recent years, significantly lower than the level in developed countries.

In 2010, top three enterprises by output of refrigerated vehicle were Beiqi Foton Motor Co., Ltd., Zhenjiang Speed Automobile Group Co., Ltd. and China International Marine Containers (Group) Ltd. (CIMC).

In addition to a research on the refrigerated vehicle and cold storage enterprises closely related to the China cold chain logistics industry, this report makes an in-depth analysis of the operation, development strategy and cold chain logistics plan of cold chain logistics operators.

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In terms of refrigerated truck, the major enterprises involve Foton, JAC, Dongfeng Motor, Qingling Motors, and FAW, etc., of which Foton and JAC ranked among the top 2 in the sales volume of light-duty and medium-duty refrigerated trucks, and Dongfeng Motor and FAW take the lead in the sales volume of heavy-duty refrigerated trucks.

Key Cold Chain Logistics Enterprises in China by Industry Chain

Industry Chain	Key Enterprises
Cold Storage	Xianyi Holding, Swire Cold Chain Logistics, Zheng Ming Modern Logistics, CMAC, Chengdu Silver Plow, Jinjiang International, Liaoyu Group, and Gaishi International Logistics, etc.
Refrigerated truck	Foton, JAC, Dongfeng Motor, Qingling Motors, FAW, Bingxiong, China International Marine Containers Group, KF Mobile Systems, Zhenjiang Feichi Automobile Group, Hubei Chengli Special Purpose Vehicle, and JMC, etc.
Refrigeration Equipment	Dalian Refrigeration, Yantai Moon, Guangzhou Baier Cold-Chain Polyurethane Science & Technology, and Zhengzhou Kaixue Cold Chain, etc.
Cold Chain Logistics Operation	Xianyi Holding, Swire Cold Chain Logistics, Zheng Ming Modern Logistics, CMAC, Wuhan Wandun Cold Storage Logistics, and Gaishi International Logistics, etc.

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As for refrigeration equipment, Yantai Moon and Dalian Refrigeration had a duopoly in the large refrigeration equipment. Snowman Co., Ltd has targeted cold chain logistics market, hoping to extend its industry chain.

The report mainly deals with the following:

- Overview of cold chain logistics industry, including definition, classification, composition structure, industry chain, market characteristics, business model, and industry policies, etc;
- Overview of China's cold chain logistics market, including market size, market demand, competitive landscape, market structure, and development prospects as well as analysis of the Yangtze River Delta, the Pearl River Delta and the Beijing-Tianjin-Hebei region;
- Cold chain logistics market segments, including the market features and demand in meat, fruits & vegetables, frozen rice & flour, aquatic products, and dairy products, etc.;
- Cold Storage market analysis, including market profile, overall capacity, regional analysis, competitive pattern and market forecast;
- Refrigerated truck market analysis, including market profile, overall capacity, regional analysis, competitive pattern, and market forecast;
- 20 cold chain operators, involving profile, operation, revenue structure, R&D costs, cold chain business, and development strategy, etc.;
- 17 refrigerated truck and cold chain equipment manufacturers, covering profile, operation, revenue structure, R&D costs, cold chain equipment business, and development strategy, etc.

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As China’s policy and standards for cold chain becomes clear, fresh food e-commerce springs up and financial innovations are further made, the cold chain logistics industry of China will take a great leap forward and will be sized by RMB512.25 billion in 2026, showing a CAGR of 9.4% from 2019 to 2026. Fruit & vegetable market holds the largest market segment in terms of cold chain circulation followed by seafood.Chinese governments at all levels are racking up the investments in cold chain infrastructure, facilitating enlargement of cold chain logistics. The demand for cold chain facilities has led to a large number of small players in the market with a low degree of specialisation, leading to problems like high operating costs and unbalanced and insufficient development.Subsequently, the market is experiencing collaborations and new entries of companies to set up their firm foot in the market. Cold chain logistics is driven primarily by meat, aquatic products, quick-frozen food, fruits & vegetables, and dairy products, among which the fruit & vegetable cold chain is now the largest market segment in terms of cold chain circulation, and aquatic products have a fast-growing demand for cold chain. (Xianyi Holding, China)6.2.8 HNA Cold Chain6.2.9 CJ Rokin Logistics and Supply Chain Co. Ltd.6.2.10 Zhenjiang Hengwei Supply Chain Management Co. Ltd.6.2.11 Hunan Hongxing Frozen Food6.2.12 Shanghai Speed Fresh Logistics Co. Ltd.6.2.13 Chengdu Silverplow Low-temperature Logistics6.2.14 China Merchants Americold (CMAC)7 FUTURE OF CHINA COLD CHAIN LOGISTICS MARKET For more information about this report visit Research and Markets also offers Custom Research services providing focused, comprehensive and tailored research. As concerns competition in cold chain logistics: Logistics operation: the majority of cold chain logistics operators are engaged in both cold storage and cold chain transportation, such as Xianyi Holdings, Swire Cold Chain Logistics, and ZM Logistics that boast huge cold storage capacity and strong transportation capability domestically. In order to fulfill the demand, the market is actively embracing the cold chain solutions for their operational activities.Key Market TrendsChanges in Consumer Habits Fueling the Demand for Cold Chain FacilitiesThe cold chain market of China is likely to become the most rewarding sub-industry in the logistics sector backed by the changing consumption patterns and increasing demand for commodities like fresh food and medicine. In 2019, the Chinese cold chain logistics market showed an annual compound rate growth of 10.5% between 2010 and 2019.Major e-commerce players and logistics giants like JD.com are focusing on collaborating or establishing self-operating cold chain warehouses in order to expand their cold-chain delivery services in the country.Developments in Chinese Biotech SectorThe Chinese biotech is particularly undergoing notable developments. In 2019, the Chinese cold chain logistics market was worth RMB276.37 billion, growing an annual compound rate of 10.5% between 2010 and 2019. The top ten cold storage operators had a total of cold warehousing capacity up to 25.15 million cubic meters in 2019, an about 17.3% share of the national total, and the typical companies are Xianyi Holdings, Swire Cold Chain Logistics, and China Merchants Americold, each of which enjoys a nationwide cold storage network. The Chinese residents see a change in food consumption and there is a growing market demand for cold chain of food alongside the accelerating urbanization in China. Key Topics Covered 1 INTRODUCTION1.1 Study Deliverables1.2 Study Assumptions1.3 Scope of the Study2 RESEARCH METHODOLOGY2.1 Analysis Methodology2.2 Research Phases3 EXECUTIVE SUMMARY4 MARKET DYNAMICS AND INSIGHTS4.1 Current Market Scenario4.2 Market Dynamics4.2.1 Drivers4.2.2 Restraints4.2.3 Opportunities4.3 Technological Trends and Automation4.4 Government Regulations and Initiatives4.5 Industry Value Chain/Supply Chain Analysis4.6 Spotlight on Ambient/Temperature-controlled Storage4.7 Industry Attractiveness - Porter's Five Forces Analysis4.8 Impact of Emission Standards and Regulations on Cold Chain Industry4.9 Impact of COVID-19 on the Market5 MARKET SEGMENTATION5.1 By Services5.1.1 Storage5.1.2 Transportation5.1.3 Value-added Services (Blast Freezing, Labeling, Inventory Management, etc.)5.2 By Temperature Type5.2.1 Chilled5.2.2 Frozen5.3 By Application5.3.1 Horticulture (Fresh Fruits & Vegetables)5.3.2 Dairy Products (Milk, Ice-cream, Butter, etc.)5.3.3 Meats, Fish, Poultry5.3.4 Processed Food Products5.3.5 Pharma, Life Sciences, and Chemicals5.3.6 Other Applications6 COMPETITIVE LANDSCAPE6.1 Market Concentration Overview6.2 Company Profiles6.2.1 Sinotrans Ltd.6.2.2 SF Express6.2.3 Beijing Ershang Group6.2.4 Shanghai Jin Jiang International Industrial Investment Co. Ltd.6.2.5 Nichirei Logistics Group Inc.6.2.6 Shandong Gaishi International Logistics Group (Gaishi Group)6.2.7 Henan Fresh Easy Supply Chain Co., Ltd. Many biotech firms in the market are building on recent progress in genomics, focusing on rare genetic diseases.The development is supported by the Chinese rules and regulation acting as a layer of protection for the market. The market for cold chain logistics in China is anticipated to grow at a CAGR of more than 9% during the forecast period (2020-2025).China has a huge consumer population for agricultural products and currently accounts for about 60% of the world's total vegetable production, 30% of fruit and meat production, and 40% of eggs and aquatic products.With the increase in the disposable income of the middle class and upper-middle-class in the country, people are willing to spend for and pay more attention to the various diversity of fresh agricultural products, food safety and the quality of fresh agricultural products. For instance, in July 2019 Japanese trading company Marubeni announced its joint venture with Chinese logistics startup G7 to lease refrigerated trailers to Chinese customers seeking to meet fast-growing demand for fresh food.Also, the Chinese e-commerce giant JD.com teamed up with Mengniu Dairy Co Ltd, China's major dairy maker, in the cold chain logistics sector to make its nationwide network available to Mengniu for its frozen products. According to official figures, scientific R&D spending topped USD 291 billion in 2018, just over 2% of gross domestic product, and the government is targeting even higher spending of 2.5% of GDP this year.The Chinese government has introduced a centralised procurement process, known as 4+7 bulk tendering intended to bring down prices for common drugs. The Chinese residents see a change in food consumption backed by the increased disposable income and growing market demand for the cold chain of food alongside the accelerating urbanization in China.Cold chain logistics in China is mainly driven by meat, seafood, quick-frozen food, fruits & vegetables, and dairy products. This regulatory change has helped the generic drugmakers focus on volume and big companies with advanced research teams chase higher margins.Competitive LandscapeThe Chinese cold chain market is highly fragmented with Sinotrans, SF Express and Beijing Ershang Group as its leading players in the market. What’s more, medicines, particularly vaccines, blood products and diagnostic reagents will be a key growth driver for cold chain logistics. The rules of sharing of medical information are very stringent as compared to the US and other developed countries, which means Chinese companies have access to far more patient data than their western rivals.The Chinese government is pumping billions into biotech research and development. 22, 2021 (GLOBE NEWSWIRE) -- The "China Cold Chain Logistics Market: Growth, Trends and Forecasts (2020-2025)" report has been added to ResearchAndMarkets.com's offering. China Cold Chain Industry Report, 2020-2026 highlights the following: Cold chain logistics (definition, classification, composition, industry chain, market features, business models, industrial policy, etc.); Chinese cold chain logistics market (market size, demand, competitive landscape, market structure, prospects as well as the development in key areas including the Yangtze River Delta region, the Pearl River Delta region and the Beijing-Tianjin-Hebei region); Cold chain logistics market segments (fruits & vegetables, meat, quick-frozen food made of wheat flour and rice, aquatic products, dairy products); Cold storage market (overview, gross capacity, regional analysis, competitive pattern, forecasts); Refrigerated vehicle market (overview, overall scale, regional analysis, competitive pattern, forecasts); 22 cold chain operators (profile, performance, revenue structure, cold chain business, development strategy, etc.) Dublin, Jan. Cold storage operation: the Chinese cold storage market is scattered and characterized by low concentration and distinct regionality. Chinese governments at all levels beef up investments in cold chain infrastructure, facilitating enlargement of cold chain logistics.

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