Research and Development Forecast of China's Tomato Products Industry, 2014-2018

(Sample)

Huidian Research

Publication Date: Feb 2014
4. Economic Operation of Tomato Products Industry

4.1 Production and Sales

China’s tomato industry started late but the growth is rapid. Due to limited consumption volume in China, most of products are available for export, so China has become the world’s largest exporter of tomato sauce. Currently China’s tomato production bases are mainly concentrated in Xinjiang and Inner Mongolia provinces. Xinjiang accounts for more than two thirds of total output across the country, and less than one third in Inner Mongolia. China has advantages in geography and cost as for tomato product production, but China mainly produces primary tomato products.

In 2012, there were 850 thousand mu (1 mu = 666.7 square meters) of planting areas nationwide, dropped by 52% compared with 1.76 million mu of planting areas in 2011. According to the statistics by China Canned Food Industry Association (CCFIA), the output of processing tomato was less than 5 million tons in 2012 in China, dropped by around 30%. At present, the processing capacity of tomato sauce is more than 2 million tons in China. The processing capacity is excessive and the low profit in this industry has not been changed fundamentally yet.

![Fig. 13 Output of China's Processing Tomato, 2009-2013](http://www.caijing.com.cn/)

There are many varieties of tomato products in China, but tomato sauce output has the largest volume, approximately accounting for 90% of tomato products. In 2012, there were 166 tomato product processing plants, the processing capability was more than 250 thousand (ton/day), and it could process 13.75 million tons tomato annually if at full production, so severe overcapacity existed in China. In reality 950 thousand tons to 1.29 million tons tomato products (mainly refer to tomato sauce) are produced annually, while the tomato products for self-use are less than 200 thousand tons every year, most of products are available for export.
In 2010, China exported nearly 1.04 million tons of tomato products (mainly refer to tomato sauce); in 2011 the export volume was more than 1.14 million tons. The export volume was 1.1 million tons in 2012, dropped by 4.3% year-on-year, and the export volume of small packs of tomato sauce or ketchup grew rapidly, and the export structure seems to be more reasonable. At the first half of 2013, the average export price was more than 900 USD/ton, exceeding the industry break-even line, so the development momentum is vigorous.

**Fig. 14 Production and Domestic Consumption of Tomato Products, 2009-2013**

(Unit: 10000 Tons)


**Table of Contents**

1. Development Environment of China’s Tomato Products Industry
   1.1 Market Features
   1.2 Industry Characteristics
   1.3 Industry Chain

2. China’s Tomato Product Environment
   2.1 China’s Economic Development Environment
   2.2 Policy Environment

3. Technological Development of China's Tomato Products Industry
   3.1 Current Technological Development Situation
   3.2 Technological Gap between China and Foreign Countries and the Main Reasons
   3.3 Strategies for Improving China’s Technology

4. Economic Operation of Tomato Products Industry
4.1 Production and Sales
4.2 Industry Scale
4.3 Profitability

5. Import and Export of China’s Tomato Products Industry
5.1 Features
5.2 Import
5.3 Export

6. Influence of Competitive Landscape on Investment
6.1 Porter’s Five Forces
6.2 Competitive Landscape
6.3 Forecast of Competitive Trend

7. Key Enterprises in China’s Tomato Products Industry
7.1 Thai Sun & Richharvest Group of Companies
  7.1.1 Company Profile
  7.1.2 Business Performance
  7.1.3 Competitiveness
  7.1.4 Development Strategies
  7.2 Heinz
  7.2.1 Company Profile
  7.2.2 Business Performance
  7.2.3 Competitiveness
  7.2.4 Development Strategies
  7.3 COFCO TUNHE
  7.3.1 Company Profile
  7.3.2 Business Performance
  7.3.3 Competitiveness
  7.3.4 Development Strategies
  7.4 CHALKIS
  7.4.1 Company Profile
  7.4.2 Business Performance
  7.4.3 Competitiveness
  7.4.4 Development Strategies
  7.5 Hanhao Group
  7.5.1 Company Profile
  7.5.2 Business Performance
  7.5.3 Competitiveness
  7.5.4 Development Strategies
  7.6 Xinjiang Tianye (Group) Co., Ltd.
  7.6.1 Company Profile
  7.6.2 Business Performance
  7.6.3 Competitiveness
7.6.4 Development Strategies

8.1 Future Development
8.2 Development Trend of Concentration Ratio
8.3 Overall Industry “Twelfth Five-Year” Plan and the Forecast

9.1 Investment Opportunity
9.1.1 Macro-economic Investment Opportunity
9.1.2 Market Investment Opportunity
9.2 Investment Risk
9.2.1 Market Risk
9.2.2 Cost Risk
9.2.3 Trade Risk
9.2.4 Policy Risk
9.3 Suggestions for Investment
9.3.1 Grasp the Opportunity of State Investment
9.3.2 The Implementation of Competitive Strategic Alliance