



# 中国焙烤食品现状及发展趋势

## Current Situation & Trend of China Bakery Industry

中国焙烤食品糖制品工业协会秘书长 周广军

Secretary-general

Zhou Guangjun

China Association of Bakery & Confectionery Industry

2012.09.25

# Preface 前言

我国焙烤食品行业基本情况

- Current Situation of China Bakery Industry

行业竞争特点

- Characteristics of Industry Competition

行业发展趋势

- Trend in China Bakery Industry

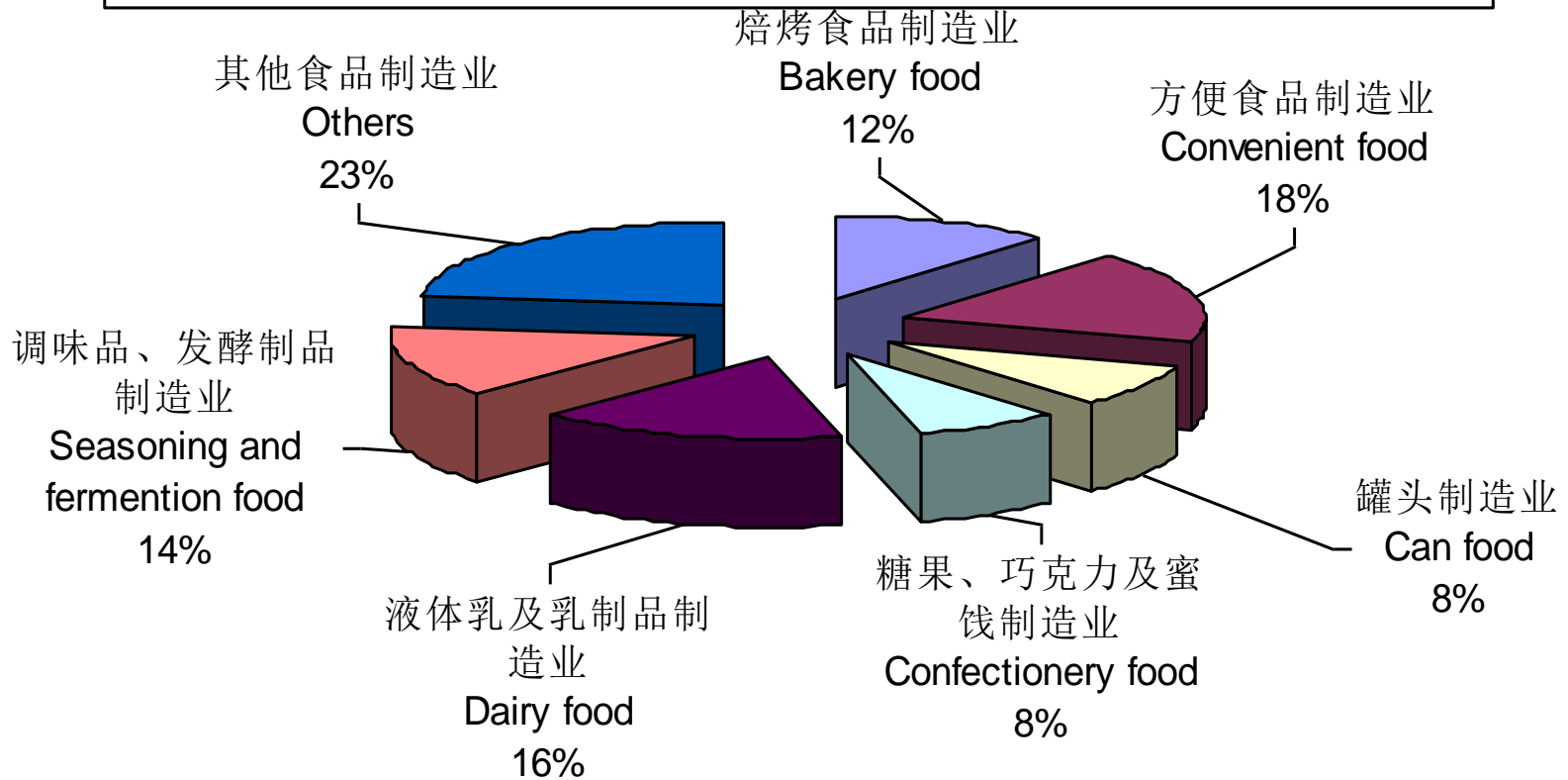
行业发展预测

- Industry Development Forecast

# 食品制造业组成所占比例示意图

## The divided percent of food industry

- 焙烤食品制造业
- 方便食品制造业
- 罐头制造业
- 糖果、巧克力及蜜饯制造业
- 液体乳及乳制品制造业
- 调味品、发酵制品制造业
- 其他食品制造业



# 1. 我国焙烤食品行业基本情况

## Basic Situation

## 1.1 行业现状 Current Situation :

- At the end of 2011, according to the National Bureau of Statistics, China bakery industry enterprises above designated size (i.e all state and an annual sales income of 20 million CNY and more than the non-state-owned industrial enterprises) is 1036, when the price of industrial sales output value of 162.996 billion CNY
- The annual profit of about 13.83 billion CNY with a product export delivery value of 3.33 billion CNY

## 1.2 行业简介 Brief Introduction


### ■ 1.2.1 糕点业 Pastry Industry

Category: habits are divided into two types of Chinese and Western.

Chinese pastries refers to traditional Chinese pastries food.

The pastries in production methods, varieties of patterns, especially differences in flavor, the formation of a variety of unique pastries genre, that helps style.

Beijing-style pastries, Soviet-style cakes, pastries and other types Cantonese.

- 
- Western pastries from abroad into our country and pastries collectively referred to, has the style and characteristics of Western nations, such as German/French/English/Russian and others.
  - At present, China is still not a Western-style pastries Harmonized System of Classification.
  - According to the survey conducted by the National Bureau of Statistics of the above-scale enterprises, in 2011 the number of firms in the pastry industry is of 430; product sales income of 52.62 billion CNY with a year-on-year growth of 41.2%

## 1.2.2 饼干业 Biscuit Industry

- According to statistics made by the National Bureau of Statistics of the above-scale enterprises, the biscuit industry in China in 2011 accounts to 606 enterprises; product sales revenue is of 113.465 billion CNY with a year-on-year growth of 39.16%



### 1.2.3 面包业 Bread Industry

According to industry estimates:

- the number of China's annual output of bread is about 300 million tons
- the annual per capita consumption of bread is about 2.2 kg; urban population of 600 million is estimated that the per capita annual consumption compared to 5 kg.
- At present, in China we find mainly soft bread.

## 1.2.4 饼店业 Bakery

- Chinese bakery industry has gone through two decades of development and achieved gratifying results. Bakery stores are in the increase, health conditions continue to improve with new improved varieties/colors/quality production equipment and technology/freshness/personalized service to attract more consumers
- Association has incomplete statistics: China has more than 70 000 bakery, employing more than 80 million people with an annual output value of over 500 billion CNY

## 2. 行业竞争特点

# Characteristics of Industry Competition

## 2.1、主产区相对集中

### Main producing areas are relatively concentrated

- Biscuit industry: companies are more concentrated in the economically developed coastal regions and major grain producing areas, the main producing areas are relatively concentrated in Henan, Hubei, Guangdong, Shandong, Fujian, Sichuan and other provinces and cities.
- Bakery industry: the shorter its shelf life of the product itself and requirements for fresh consumption characteristics of the industry more than do regional markets based on.
- 2011 annual production of a large province, Guangdong, Shandong, Fujian, Zhejiang, Henan, Shanghai and other production accounts for about 50% of the country

## 2.2、市场容量大，消费水平多层次：

### High market capacity with multi-level of consumption

- China has a large population - per-capita income gap between the performance of the consumer market for large capacity, multi-level.

## 2.3、价格竞争成为主要竞争手段： Price has been the main way of competition

- There was a relative oversupply situation in the baking industry in recent years, intensified competition within the industry.
- In response to competition measures: usual small investments, easy operation means the price cuts or dosage does not increase promotional way

## 2.4、行业外向度不足，国外市场有待进一步开发：

### Insufficient extroverted degree, overseas market needs further development

- Our baked goods exports are very small in sales value, pastries accounted for 6-10%, biscuits account for 2-4% of the proportion, not conducive to enterprise capacity to play, the improvement of the ability to resist risks.
- The lack of marketing concepts and marketing knowledge/personnel is a problem to open to foreign markets - that impeaches export volume to increase

### 3. 行业发展趋势

## Trends in the China Bakery Industry



### 3.1、健康天然的焙烤食品是发展方向： More natural and healthier

- More and more people want to pay for food quality and safety and wholesome products.
- Require low-sugar, low-fat, low-calorie baked goods, raw materials, natural & non-polluting, non-toxic & harmless ingredients

### 3.2、国际性风味食品越来越普遍： More products with international flavor

- Exotic specialty food in their proportion is growing. Japan, South Korea, Singapore and other countries open bakeries and continues unabated. They bring new products and advanced business model, and has gradually become a new bright spot in China bakery industry.

### 3.3、新鲜的烘焙食品受到消费者的欢迎： Fresh bakery products are more welcomed by consumers

- Freshness is one of the main indicators in the measure of baked goods quality.
- The frozen technology applications and various baking the development of ready-mixed flour, frozen dough, make and sell for the baking industry, especially bakery produce fresh baked goods to provide convenient conditions.

## 4. 行业发展预测

# Industry Development Forecast

## 4.1 饼干业 Biscuit Industry

- Industry forecasts: the biscuit industry capacity in the next five years will be over 300 million tons (based on average more than 15% of the speed increase)
- In the next 10 years, the structure of biscuit products will continue to show the common development of high-grade and low-grade products.
- High-grade biscuit snack functions will be the last dual function of the direction of development, and biscuit products will also be innovative in taste/texture/shape/packaging, and meet consumer's individual needs

## 4.2 糕点业 Pastry Industry

- Industry forecasts: the pastry industry will maintain the existing 100 million tonnes on the basis of a faster growth rate. In 2015 will reach 180 million tons.
- Show a rising trend in birthday cakes/wedding cakes/celebration cakes/holiday cakes and other social needs, a variety of festive pastries such as Lantern/rice balls/dumplings/moon cake/rice cake with continued steady development;
- Leisure delicious snack production needs will continue to increase;
- The moon cake remains a typical example of Chinese pastries

## 4.3 面包业 Bread Industry

- Industry forecasts: on the basis of the existing production of 300 million tons of bread growing to 2015, reaching a level of 400 million tons.
- Bread consumption is very low because of the standard of living and eating habits of Chinese people for long. The accelerated pace of life, the gradually improved standards of living has also increased the demand for bread



**谢谢！**

**Thanks!**

中国焙烤食品糖制品工业协会  
[www.china-bakery.com.cn](http://www.china-bakery.com.cn)