

China Coffee Industry Development and Government Policy



中国果品流通协会咖啡豆分会
Coffee Branch of China Fruit
Marketing Association (CCA)

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中国咖啡产业规模

中国咖啡最大的咖啡生产基地在云南省，栽种面积及产量分别占全国咖啡种植面积
面积的96%、98.5%。全国咖啡种植面积140万亩(93333公顷)、商品豆产量8.3
万吨。

The Scope of Coffee Industry in China

Yunnan Province is the largest coffee growing region in China. The plantation areas
reach around 96%, and production yields are 98.5% of all China. There are 93,000
hectares plantation areas and the bean production sums up to 83,000 tons.

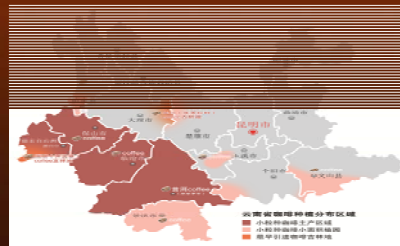


云南咖啡原产地分布

中国云南省初步形成了优势区域布局，全省已形成了保山、德宏、普洱和临沧四大主产区。海南岛分布在澄迈福山、万宁和三亚。

The Distribution of Coffee Growing Areas in Yunnan

There are four main growing areas in Yunnan, including Baoshan, Dehong, Puer and Lincang. Hainan Province has three main growing areas, namely Chengmai, Wanning and Sanya.



中国咖啡深加工配套工业

国内仅有4个较大的咖啡深加工厂家：云南后谷、海南力神、雀巢和麦斯威尔。国内最大的速溶粉生产者，设计产能达到13000多吨的云南后谷。雀巢在广州的生产线有2000吨，麦斯威尔1000吨，海南的力神年生产能力600吨。年产不足100吨的深加工工厂仅5家左右。

Coffee processing factories

There are only four large coffee processing factories in the country, including Yunnan Hogood, Hainan Lisun, Nestle and Maxwell House. Hogood is the biggest instant coffee company in China with an output of over 13,000 tons. Nestle has a 2,000 tons production line in Guangzhou. Maxwell House has 1,000 tons output, and Hainan Lisun is 600 tons output per year. There are another 5 coffee processing companies with less than 100 tons each every year.



咖啡科学研究配套体系

- (1) 云南省农业科学院
- (2) 云南省热作研究所
- (3) 云南省热经研究所
- (4) 云南省热带作物学院

Technological and Scientific Research

- Tropical Commercial Crop Research Institute of Yunnan Provincial Agricultural Science Academy
- Tropical Crop Research Institute of Dehong Autonomous Canton
- Yunnan Tropical Crop Research Institute
- Yunnan Provincial Tropical Crop Academy



中国咖啡的消费市场

目前，咖啡消费在中国城市里，平均每人每年的咖啡消费量是4杯，即使是在北京、上海这样的大城市，每人每年的消费量也仅有20杯。而在日本和英国，平均每人每天就要喝一杯咖啡。

Coffee Consumption in China

At present, the coffee consumption is 4 cups per person per year in the cities. Even in big cities such as Beijing and Shanghai there are only 20 cups per person every year.



2011年国内咖啡消费量在8万吨左右，占世界消费量的0.7%，今后三年增长率将超过20%，传统现磨咖啡将增速达30%。预计到2015年国内咖啡消费量将达16万吨，2020年达到30万吨，届时将成为亚洲第二大咖啡消费国。

In 2011, the domestic coffee consumption has been approximately 80,000 tons, and about 0.7% of world consumption. It will see increase rates over 20% within three years, and traditional grind coffee will increase around 30% soon. In 2015, domestic coffee consumption will reach approximately 160,000 tons. In 2020, it will reach around 300,000 tons. At that time, China will become the second largest coffee consumption country in Asia.



台湾整体市场超500亿台币，每人每年平均消费100杯。2012年11月，被今日美国报（USA Today）旅游版（Smarter Travel）被评选为全球十大最佳品尝咖啡的城市，台北称为唯一上榜的亚洲城市，名列第10。

The whole coffee market in Taiwan has over 10 billion RMB with the consumption of 100 cups everyone per year. In November 2012, Taipei has been voted one of the best tasting coffee cities in world's top 10 cities by USA Today newspaper.



市场潜力广阔

潜在的咖啡消费者达2~2.5亿人

饮料市场：以茶叶为主→以咖啡为主

我国将成为世界上最重要的咖啡消费市场之一。

The potential coffee consumption market in China is large.

The potential consumers will be 200 million – 250 million.

Due to generational change, tea consumption will partly shift to coffee consumption.



Coffee Promotion Strategies

Events organized by CCA

- Guangzhou YIFAN Imported Food Exhibition
- China Young Barista Exhibition Ralley (CYBER)
- China Specialty Coffee Tasting Center (Beijing)
- China Coffee Street (Beijing)



国家咖啡产业发展规划

中央：稳妥发展咖啡等特色作物

云南省咖啡产业发展规划：100万亩（66666公顷）

海南省政府“十二五”规划：10万亩（6666公顷）

Plans for the Development of Coffee Industry in China

- The Central Government has committed to support the steady development of specific crops such as coffee.
- The development plan of Yunnan province aimed to make available 67,000 hectares for coffee growing until 2020, but actually they already hit this mark by end 2012.
- The 12th Five Year Plan for Hainan province aims to make available 6,700 hectares



《农业部特色农产品区域布局规划（2006—2015年）》

这一规划旨在引导特色农产品向最适宜区集中，促进农业区域专业分工，加快形成科学合理的农业生产力布局

《关于促进我国热带作物产业发展的意见》

强化支持政策、完善配套措施、挖掘资源潜力、优化产业结构、转变发展方式，促进我国热带作物产业的持续健康发展和《全国热带作物产业发展第十二个五年规划》（2011年9月9日），都把咖啡列为重点发展的产业，其中云南西南部、广东雷州半岛和海南西北部列为优势产区。

The Ministry of Agriculture's regional plan for specific agricultural products (2006-2015) and the State Council opinion on the promotion of industrial development of tropical crops (October 15, 2010) demand to strengthen support policies, to improve supporting measures, to tap the resource potential, to optimize the industrial structure, to change the mode of development, in order to promote the sustainable development of the tropical crops industry.

The 12th Five-Year plan of National tropical industrial development, regards the southwestern Yunnan, Leizhou Island of Guangdong, northwestern Hainan as a key areas of coffee industry.



《农业部特色农产品区域布局规划（2006—2015年）》
《农业部关于加快热作产业发展的意见》
《全国热作产业发展第十二个五年规划》
加强对外交流合作体系建设，提高热作国际影响力和竞争力

The regional distribution plan for specific agricultural products (Ministry of Agriculture, 2006-2015)
Guideline on the tropical crops industrial development (Ministry of Agriculture)
The 12th Five-Year Plan on the tropical crops industrial development (Ministry of Agriculture)



《关于支持农业产业化经营重点龙头企业的意见》
《关于若干农业生产资料征免增值税政策的通知》
《关于加快发展农业产业化经营的意见》

Opinion on supporting the leading agriculture enterprises operation
Notice on value-added tax exemption of certain materials of agricultural products policy
Opinion on accelerating of the development of agricultural industrial operation



政策主要目标

降低龙头企业特别是农产品加工企业的投资成本
促进投资模式多元化和筹资渠道多样化
加大财政对企业投资的补助

Main objectives of policies

- To reduce the investment cost of the leading enterprises especially the agricultural products processing enterprises
- To promote diversification in investment modes and financing methods
- To increase financial subsidies for enterprises investment



一是满足重要龙头企业的资金需求
二是降低重点龙头企业的融资成本
三是对农业产业化重点领域加大支持力度

- To meet the financial needs of the leading enterprises
- To reduce the costs of the leading enterprises
- To strengthen the support for the key areas of agricultural industrialization



国家科技政策

鼓励和支持龙头企业进行科技开发和创新
技术开发费用扣除
技术改造国产设备投资所得税抵免
技术创新资助

Science and Technology Policies in China

- To encourage and support leading companies to foster scientific and technological innovation and development
- To reduce the costs of technological development
 - To offer tax cuts to innovators of Chinese products
- To fund technological innovation



国家贸易政策

提升企业产品的竞争力
扩大企业产品的市场占有率

Trade Policies in China

- To improve the competitive power of all products
- To increase the market share of its products



Thank you

