



Global and China Industrial Enzyme Industry Report, 2012-2014

Nov. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include China Customs, the Ministry of Agriculture and National Bureau of Statistics of China etc.

Abstract

Industrial enzyme which refers to the enzyme preparation used for industrial purposes can be applied to detergent, animal feed, bread, brewing (beer, wine, etc.), papermaking, textile, bio-ethanol and so forth; especially, food & brewing, feed and detergent are the most commonly application fields, and they consume about 75% of industrial enzyme together.

The industrial enzyme market size has been expanding in recent years with the improvement of R&D technology and the extension of application range. From 2001-2011, the global industrial enzyme market scale presented a CAGR of 6.8%, and in 2011 the global market valued USD3.5 billion, with a year-on-year growth rate of 6.1%. Through numerous mergers and acquisitions, the global industrial enzyme market concentration degree has been gradually raised. In 2011, Novozymes and DuPont (DuPont acquired Genencor) enjoyed market share of 47% and 21% respectively.

Through several decades of development, China has become an important production base of industrial enzyme, and its market size accounts for about 10% of the global size. Judging from Chinese

economic situation and domestic demand, the industrial enzyme market of China is expected to embrace a faster growth rate of 10% or so than the global 6%-8% in the next three years, and it will reach at least RMB3 billion in 2014. Yet, foreign tycoons with patent monopoly and strong R&D capabilities have entered China in succession, while Chinese counterparts are lagged in R&D, therefore Chinese native enzyme preparation enterprises have weak competitiveness, and the Chinese market is still currently dominated by Novozymes, DuPont (Genencor) and other foreign brands.

However, in market segments like feedstuff, Chinese play, VTR, for example, occupy a significant position, with 16.5% share (by sales volume) in Chinese feed enzyme market in 2011. Meanwhile, local enterprises are not only increasing new products, but also striving to expand their production scale and enhance marketing; for instance, VTR invested the funds raised from IPO in “12,000 t/a Enzyme Preparation Project Phase II” in Inner Mongolia (early 2012); Hunan Hongyingxiang and Jinshi Development Zone signed an agreement for “300,000 standard tons/a Enzyme Preparation Project” (May, 2012). Therefore, based on local advantages, it is expected that Chinese companies will sweep more market shares.

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The report covers the followings:

- Status quo, regional distribution, competition pattern and prospect of global industrial enzyme industry;
- Relevant policies, current situation, competitive landscape, import & export and prospect of Chinese industrial enzyme industry;
- Impact of industrial enzyme downstream sectors like baked food, brewing, feedstuff and bio-ethanol in China;
- Operation, enzyme preparation business and development prospect of 9 enzyme preparation suppliers at home and abroad (such as Novozymes, DuPont (Genencor), VTR, Youteer, etc.).

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