China Feed Additives Industry Report, 2012-2015

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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 Company Reports, and National Bureau of Statistics of China etc.

Abstract

Feed additives as upstream products of the feed industry refer to small (trace) amounts of nutritive or non-nutritive substances or drugs added to feed for specific needs; Its main role is to increase nutrient concentration and efficiency of feed utilization, promote livestock growth, prevent and cure diseases as well as reduce the loss of nutrients in feed.

In China, following the sustained and stable growth of feed industry, the feed additives industry has also made considerable progress. So far, there have been over 220 types of approved additives, including nearly 70 domestic types with standards, 57 types of allowed medicated additives. In 2011-2012, China's additive premix remained between 6.1-6.4 million tons. By type, amino acids, vitamins, medicated additives and biological enzymes account for a high proportion of the feed additives market, up to 80% and more.

With respect to the amino acid feed additives segment, as China gives priority to pig and poultry breeding, coupled with restricted level of feeding, the actual consumption structure of feed amino acids is oriented by methionine and lysine. In 2012, China's lysine production and consumption were 855,000 tons and 610,000 tons, respectively, showing obvious overcapacity and fierce market competition. But limited by technical barriers, only one local enterprise – Chongqing Unisplendour Chemical Co., Ltd. had realized methionine industrialization by the end of 2012. In 2012, China consumed 194,000 tons of methionine, including imports of 183,000 tons.

Seen from the vitamin feed additives segment, China has become an important global feed vitamin producing and consuming country. In recent years, Chinese external exports of vitamin has accounted for about 80% of the total output over the same period. In 2012, China produced 240,000 tons of vitamins, including exports of 187,000 tons. However, affected by the economic recession in Europe and America, the Chinese vitamin market in the future will face a grim situation, especially the export volume will fall even more. It is expected that Chinese vitamin production in 2013-2015 will be around 220,000-280,000 tons, with exports occupying 75%-80%.

In terms of the medicated additives segment, although Europe, the United States and other developed countries have already exercised strict control over the production and application of antibiotic drugs in feed, the proportion is still high in China. Feed-grade chlortetracycline (FG CTC) is one of them. In 2012 the world's overall production capacity of FG CTC reached 100,000 tons/a, of which, China-based Jinhe Biotechnology Co., Ltd., Zhumadian Huazhong Chia Tai Co., Ltd and Pucheng Zhengda Biochemistry Co., Ltd. accounted for 85% or so.

China Feed Additives Industry Report, 2012-2015 of ResearchInChina mainly includes the following aspects:

--Development status, competition pattern, import & export and development trends of China feed additives industry;

--Analysis on feed-use amino acids, vitamins, enzymes, medicated additives and other market segments;

--Operation, feed additive business, development tendency, etc. of 14 domestic companies.

Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080
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