
July 2013
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.
# Table of contents

1. Overview of Feed Additives

2. Overview of China Feed Additives Industry
   2.1 Development Status
   2.2 Competition Pattern
   2.3 Import & Export
   2.3.1 Export
   2.3.2 Import
   2.4 Development Trends

3. Chinese Feed Additives Market Segments
   3.1 Amino Acid
      3.1.1 Lysine
      3.1.2 Methionine
      3.1.3 Threonine
      3.1.4 Tryptophan
   3.2 Vitamin
      3.2.1 Development Status
      3.2.2 Competition Pattern
      3.2.3 Development Trends
   3.3 Enzyme
      3.3.1 Development Status
      3.3.2 Competition Pattern
      3.3.3 Development Trends
   3.4 Medicated Additives
      3.4.1 Development Status
      3.4.2 Chlortetracycline
      3.4.3 Flavomycin

4. Key Companies in China
   4.1 Meihua Group
      4.1.1 Profile
      4.1.2 Operation
      4.1.3 Revenue Structure
      4.1.4 Gross Margin
      4.1.5 Feed Additive Business
      4.1.6 Prospect & Forecast
   4.2 COFCO Biochemical (AnHui) Co., Ltd.
      4.2.1 Profile
      4.2.2 Operation
      4.2.3 Revenue Structure
      4.2.4 Gross Margin
   4.3 Zhejiang NHU Co., Ltd
      4.3.1 Profile
      4.3.2 Operation
      4.3.3 Revenue Structure
      4.3.4 Major Clients
      4.3.5 Feed Additive Business
      4.3.6 Prospect & Forecast
   4.4 Zhejiang Medicine Co., Ltd.
      4.4.1 Profile
      4.4.2 Operation
      4.4.3 Revenue Structure
      4.4.4 Clients & Suppliers
      4.4.5 Feed Additive Business
      4.4.6 Prospect & Forecast
   4.5 Hubei Guangji Pharmaceutical Co., Ltd. (GJPC)
      4.5.1 Profile
      4.5.2 Operation
      4.5.3 Revenue Structure
      4.5.4 Feed Additive Business
      4.5.5 Prospect & Forecast
   4.6 Guangdong VTR Bio-Tech Co., Ltd.
   4.7 Jinhe Biotechnology Co., Ltd.
   4.8 Shandong Shengli Co., Ltd.
   4.9 Shandong Lukang Pharmaceutical Group Co., Ltd. (LKPC)
   4.10 Zhejiang Shenghua Biok Biology Co., Ltd
   4.11 China Animal Husbandry Industry Co., Ltd. (CAHIC)
   4.13 Guangdong Dahanong Animal Health Products Co., Ltd. (DHN)
   4.14 Tianjin Ringpu Bio-technology Co., Ltd.
• Category of Nutritional Feed Additives
• Category of General Feed Additives
• Category of Medicated Feed Additives
• China Additive Premix Product Structure (by Animal Species), 2011
• Export Volume, Export Value and Average Export Price of Feed Additives in China, 2010-2012
• Export Volume and Export Value of Feed Additives in China (by Country / Region), 2012
• Import Volume, Import Value and Average Import Price of Feed Additives in China, 2010-2012
• Import Volume and Import Value of Feed Additives in China (by Country / Region), 2012
• China’s Feed Output (by Type) and Proportion, 2010-2011
• Feed Lysine Output and Forecast in China, 2005-2013
• Feed Lysine Consumption and Forecast in China, 2001-2013
• Import and Export Volume of Lysine in China, 2007-2012
• Market Share of Imported Methionine by Enterprise, 2012
• China’s Methionine Import and Export by Country (Volume and Value), 2012
• Global Threonine Consumption by Region, 2012
• China’s Vitamin Output and Export Volume, 2009-2012
• China’s Vitamin Export Volume Structure (by Product), 2009-2012
• China’s Vitamin Exports As a Percentage of Output, 2012-2015E
• Output of Feed Enzyme Preparation in China, 2007-2012
• Output of Feed Enzyme Preparation in China, 2012-2015E
• The World’s Major Producers of Medicated Feed Additives and Their Products
• Global FG CTC Capacity Distribution (by Enterprise)
• Revenue and Profit of Meihua Group, 2010-2012
• Revenue Breakdown of Meihua Group (By Product), 2010-2012
• Revenue Breakdown of Meihua Group (By Region), 2010-2012
• Gross Margin of Major Products of Meihua Group, 2010-2012
• Revenue and Gross Margin of Amino Acids of Meihua Group, 2010-2012
• Revenue and Profit of Meihua Group, 2011-2015E
• Revenue and Profit of COFCO Biochemical, 2009-2012
• Output, Sales Volume and Inventory of Major Products of COFCO Biochemical, 2011-2012
• Revenue Breakdown of COFCO Biochemical (by Product), 2009-2012
• Name List and Revenue Contribution of COFCO Biochemical’s Top 5 Clients, 2012
• Revenue and Gross Margin of Lysine and Its Salts of COFCO Biochemical, 2009-2012
• Revenue and Operating Income of Zhejiang NHU, 2009-2012
• Revenue of Zhejiang NHU by Product, 2009-2012
• Operating Revenue of Zhejiang NHU by Region, 2009-2012
• Name List and Revenue Contribution of Zhejiang NHU’s Top 5 Clients, 2011-2012
• Subsidiaries (Joint-Stock Companies) Involved in Feed Additive Business of Zhejiang NHU, 2012
• Vitamin Revenue and Operating Income of Zhejiang NHU by Product, 2009-2012
• Revenue and Operating Income of Zhejiang NHU, 2011-2015E
• Revenue and Net Income of Zhejiang NHU, 2009-2012
• Revenue of Zhejiang NHU by Product, 2009-2012
• Revenue Structure of Zhejiang NHU (by Region), 2009-2012
• Name List and Revenue Contribution of Zhejiang NHU’s Top 5 Clients, 2012
• Vitamin Output and Export Volume of Zhejiang NHU by Product, 2011
• Revenue and Net Income of Zhejiang NHU, 2011-2015E
• Revenue and Profit of GJPC, 2009-2012
• Revenue Breakdown of GJPC (by Product), 2009-2012
• Revenue Breakdown of GJPC (by Region), 2009-2012
• Revenue and Gross Margin of Raw Materials Series Products of GJPC, 2009-2012
• Revenue and Profit of VTR Bio-Tech, 2009-2011
• Enzyme Revenue of VTR Bio-Tech (by Product / Dosage Form), 2009-2011
• Revenue Structure of VTR Bio-Tech (by Sales Model), 2009-2011
• Name List and Revenue Contribution of VTR Bio-Tech’s Top 5 Clients, 2009-2011
• Name List and Procurement Contribution of VTR Bio-Tech’s Top 5 Suppliers, 2009-2011
• Enzyme Output of VTR Bio-Tech (by Base), 2009-2011
• Enzyme Capacity, Output and Sales Volume of VTR Bio-Tech (by Dosage Form), 2009-2011
• Enzyme Output and Sales Volume of VTR Bio-Tech (by Product), 2009-2011
• Raw Materials Procurement Quantity and Price of VTR Bio-Tech, 2009-2011
• Self-produced and Purchased Enzyme Source Quantity and Proportion of VTR Bio-Tech, 2009-2011
• Raw Materials Purchase Amount and Proportion of VTR Bio-Tech, 2009-2011
• Enzyme Prices of VTR Bio-Tech (by Product / Dosage Form), 2009-2011
• Product R&D Progress of VTR Bio-Tech by end-2011
• R&D Costs and % of Total Revenue of VTR Bio-Tech, 2009-2011
• IPO Equity Investment Projects and Funding of VTR Bio-Tech, 2012
• Revenue and Net Income of VTR Bio-Tech, 2011-2014E
• Subsidiaries (Equity Affiliates) of Jinhe Biotechnology, 2012
• Revenue and Operating Income of Jinhe Biotechnology, 2009-2012
• Operating Revenue of Jinhe Biotechnology (by Product), 2009-2012
• Revenue of Jinhe Biotechnology (by Region), 2009-2012
• Output, Sales Volume and Inventory of Medicated Feed Additives of Jinhe Biotechnology, 2011-2012
• Revenue and Operating Income of Medicated Feed Additives of Jinhe Biotechnology, 2009-2012
• Revenue and Operating Income of Jinhe Biotechnology, 2012-2015E
• Revenue and Profit of Shandong Shengli, 2009-2012
• Revenue Breakdown of Shandong Shengli (by Product), 2009-2012
• Revenue Breakdown of Shandong Shengli (by Region), 2009-2012
• Revenue and Gross Margin of Bio Business of Shandong Shengli, 2009-2012
• Revenue and Profit of LKPC, 2009-2012
• Revenue Breakdown of LKPC (by Product), 2009-2012
• Revenue Structure of LKPC (by Region), 2009-2012
• Revenue and Gross Margin of Veterinary Antibiotics of LKPC, 2009-2012
• Revenue and Net Income of Shenghua Biok Biology, 2008-2012
• Revenue Breakdown of Shenghua Biok Biology (by Product), 2010-2012
• Revenue Structure of Shenghua Biok Biology (by Product), 2010-2012
• Revenue Breakdown of Shenghua Biok Biology (by Region), 2010-2012
• Revenue Structure of Shenghua Biok Biology (by Region), 2010-2012
• Gross Margin of Major Products of Shenghua Biok Biology, 2010-2012
• Shenghua Biok Biology’s Revenue from Top 5 Clients and % of Total Revenue, 2010-2012
• Name List and Revenue Contribution of Shenghua Biok Biology’s Top 5 Clients, 2012
• Veterinary Drug Capacity, Output and Sales Volume of Shenghua Biok Biology (by Product), 2010-2011
• Veterinary Drug Sales Prices of Shenghua Biok Biology (by Product), 2010-2012
• Revenue and Gross Margin of Feed Veterinary Drugs of Shenghua Biok Biology, 2010-2012
• Revenue and Net Income of Shenghua Biok Biology, 2011-2015E
• Revenue and Gross Margin of Feed Additives of CAHIC, 2010-2012
• Revenue and Net Income of CAHIC, 2011-2015E
• Revenue and Net Income of TECON, 2008-2012
• Revenue Breakdown of TECON (by Product), 2010-2012
• Revenue Structure of TECON (by Product), 2010-2012
• Revenue Breakdown of TECON (by Region), 2010-2012
• Revenue Structure of TECON (by Region), 2010-2012
• Gross Margin of Major Products of TECON, 2010-2012
• TECON’s Revenue from Top 5 Clients and % of Total Revenue, 2010-2012
• Name List and Revenue Contribution of TECON’s Top 5 Clients, 2012
• Name List and Procurement Contribution of TECON’s Top 5 Suppliers, 2012
• Revenue and Gross Margin of Feed Additives of TECON, 2010-2012
• Revenue and Net Income of TECON, 2011-2015E
• Revenue and Net Income of DHN, 2008-2012
• Revenue Breakdown of DHN (by Product), 2010-2012
• Revenue Structure of DHN (by Product), 2010-2012
• Revenue Breakdown of DHN (by Region), 2010-2012
• Revenue Structure of DHN (by Region), 2010-2012
• Gross Margin of Major Products of DHN, 2010-2012
• Output, Sales Volume and Inventory of Feed Additives of DHN, 2011-2012
• Revenue and Gross Margin of Feed Additives of DHN, 2010-2012
• Revenue and Net Income of DHN, 2011-2015E
• Revenue and Net Income of RINGPU, 2008-2012
• Revenue Breakdown of RINGPU (by Product), 2010-2012
• Revenue Structure of RINGPU (by Product), 2010-2012
• Revenue Breakdown of RINGPU (by Region), 2010-2012
• Revenue Structure of RINGPU (by Region), 2010-2012
• Gross Margin of Major Products of RINGPU, 2010-2012
• Output, Sales Volume and Inventory of Nutritional Additives of RINGPU, 2011-2012
• Revenue and Gross Margin of Nutritional Additives of RINGPU, 2011-2012
• Revenue and Net Income of RINGPU, 2011-2015E
You can place your order in the following alternative ways:

1. Order online at [www.researchinchina.com](http://www.researchinchina.com)
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: report@researchinchina.com
4. Phone us at +86 10 82600828/ 82601561

### Party A:
- **Name:**
- **Address:**
- **Contact Person:**
- **Tel:**
- **E-mail:**
- **Fax:**

### Party B:
- **Name:** Beijing Waterwood Technologies Co., Ltd (ResearchInChina)
- **Address:** Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080
- **Contact Person:** Liao Yan
- **Phone:** 86-10-82600828
- **E-mail:** report@researchinchina.com
- **Fax:** 86-10-82601570

### Bank details:
- **Beneficial Name:** Beijing Waterwood Technologies Co., Ltd
- **Bank Name:** Bank of Communications, Beijing Branch
- **Bank Address:** NO.1 jinxiyuan shijicheng, Landianchang, Haidian District, Beijing
- **Bank Account No #:** 110060668012015061217
- **Routing No #:** 332906
- **Bank SWIFT Code:** COMMCNSHBJG

### How to Buy

**Choose type of format**
- PDF (Single user license) ……….. 2,400 USD
- Hard copy ………………………… 2,300 USD
- PDF (Enterprisewide license)……… 3,600 USD

※ Reports will be dispatched immediately once full payment has been received.
Payment may be made by wire transfer or credit card via PayPal.