



China Yeast Industry Report, 2012-2015

Aug. 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.

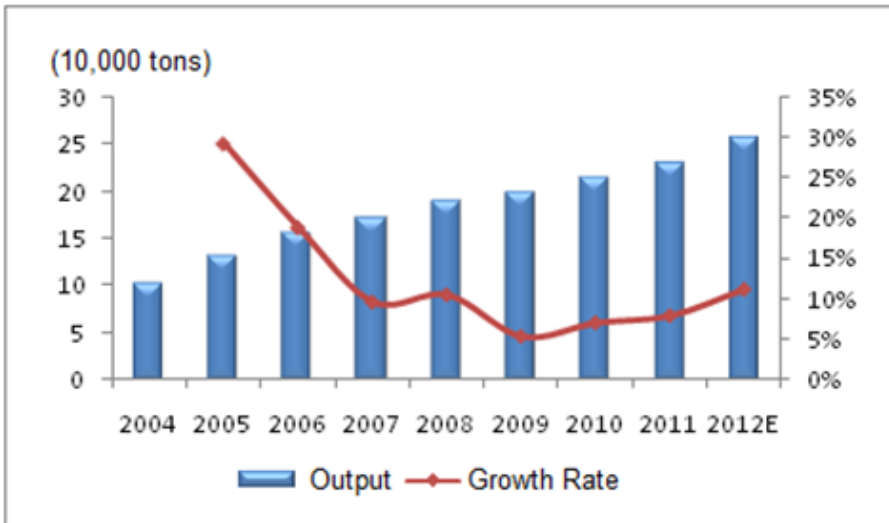
INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

During 2004-2011, the yeast output grew continuously, with the CAGR hitting 12.4%. In 2012, the figure approximated 257 kilotons in China, rising by 11.2%. The yeast production in China is mainly dominated by high active dry yeast, with output accounting for over 50% of total output; feed yeast contributes 15% or so of yeast output in China.

Yeast Output in China, 2004-2012



Source: ResearchInChina China Yeast Industry Report, 2012-2015

As an acknowledged sunrise industry, yeast industry enjoys bright development prospects. At present, the per capita bread consumption in Chinese Mainland reaches about 1.3 kg/year, much lower than that in Taiwan (9 kg/year) and Japan (10 kg/year) with similar dietary habits. Plus the demands of steamed bread, alcohol, etc. for yeast, the traditional yeast market capacity in China can amount to 384.8 kilotons theoretically.

Since the yeast market features a fairly high concentration degree, the leading companies have the bargaining power. As of 2012, there had been around 20 yeast manufacturers in China. In particular, Angel Yeast, AB MAURI and Lesaffre possess 12 plants, with capacity sharing 82% of the total. Except above three players, the rest yeast firms all characterize small scale, and the capacity of most enterprises is even less than 1,000 tons.

China Yeast Industry Report, 2012-2015 mainly covers the followings:

Development status, import & export, competitive situation at home and abroad, development prospect, etc. of yeast industry in China; Upstream molasses price, output and producing areas, and the demand of downstream terminal markets (baking industry, beer industry and feed industry) for year in China, etc.; Operation, revenue structure, yeast business, gross margin, R&D and investment, and operation of nine subsidiaries, etc. of Angel Yeast (largest yeast producer in China); Operation, etc. of other seven companies in yeast industry in China (AB MAURI, Lesaffre, Ziyang Biotechnology, Jiangmen Biotechnology, Xiwang Yeast, Tailong Food and Jiuding Yeast).

1. Overview of Yeast Industry

- 1.1 Brief Introduction
- 1.2 Main Yeast Products in China
- 1.3 Production Cost Structure

2. Development of Yeast Industry in China

- 2.1 Output
- 2.2 Competitive Environment
- 2.3 Development Prospect

3. China Yeast Industry Chain

- 3.1 Upstream Raw Materials
- 3.2 Terminal Market

4. Import & Export of Yeast in China

- 4.1 Active Yeast
- 4.2 Inactive Yeast

5. Key Yeast Companies in China

- 5.1 Angel Yeast
 - 5.1.1 Profile
 - 5.1.2 Operation
 - 5.1.3 Revenue Structure
 - 5.1.4 Gross Margin
 - 5.1.5 Yeast Business
 - 5.1.6 R&D and Investment
 - 5.1.7 Clients and Suppliers
 - 5.1.8 Forecast and Prospect
 - 5.1.9 Angel Yeast (Binzhou) Co., Ltd.
 - 5.1.10 Angel Yeast (Chifeng) Co., Ltd.
 - 5.1.11 Angel Yeast (Yili) Co., Ltd.
 - 5.1.12 Angel Yeast (Chongzuo) Co., Ltd.
 - 5.1.13 Angel Yeast (Suixian) Co., Ltd.
 - 5.1.14 Angel Yeast (Egypt) Co., Ltd.
 - 5.1.15 Angel Yeast (Liuzhou) Co., Ltd.
 - 5.1.16 Angel Yeast (Dehong) Co., Ltd.
 - 5.1.17 Angel Yeast (Hong Kong) Co., Ltd.

5.2 AB MAURI

- 5.2.1 Profile
- 5.2.2 Business in China
- 5.2.3 Meishan MAURI Yeast Co., Ltd.
- 5.2.4 Harbin MAURI Yeast Co., Ltd.
- 5.2.5 Hebei MAURI Food Co., Ltd.
- 5.2.6 Yantai MAURI Yeast Co., Ltd.
- 5.2.7 Xinjiang MAURI Food Co., Ltd.
- 5.2.8 AB (Harbin) Food Ingredients Co., Ltd.
- 5.3 Lesaffre
 - 5.3.1 Profile
 - 5.3.2 Lesaffre (Ming Guang) Co., Ltd.
 - 5.3.3 Guangxi Danbaoli Yeast Co., Ltd.
- 5.4 Zhuhai Ziyi Biotechnology Co., Ltd.
- 5.5 Guangdong Jiangmen Biotechnology Development Center Co., Ltd.
- 5.6 Shandong Xiwang Yeast Co., Ltd.
- 5.7 Qiqihar Tailong Food Co., Ltd.
- 5.8 Youyi Jiuding Yeast Co., Ltd.

- Application Scope of Yeast and Derivatives
- Consumption Ratio of Various Yeasts in China
- Main Applications of Yeast Extracts
- Production Cost Structure of Yeast
- Yeast Output in China, 2004-2012
- Main Yeast Manufacturers in China and Their Capacities
- Per Capita Bread Consumption in China, Germany, etc.
- Market Capacity Forecast of Yeast in China
- Output and Sales Volume of Finished Sugar in China, 2004-2012
- Quoted Price of Molasses Middlemen in Nanning, 2009-May, 2012
- Top 10 of Finished Sugar Output by Region in China, 2012
- Urban Per Capita Cake Consumption and Consumption Amount in China, 2002-2012
- Sales of Baked Food in China, 2000-2012
- Output and Sales Volume of Beer in China, 2004-2012
- Feed Output in China, 2000-2012
- Import Volume and Value of Active Yeast in China, 2010-Jan.-Jun.2013
- Top 10 Import Sources of Active Yeast in China by Country, 2012
- Export Volume and Value of Active Yeast in China, 2010-Jan.-May 2013
- Top 10 Export Destinations of Active Yeast in China by Country, 2012
- Import Volume and Value of Inactive Yeast in China, 2010-Jan.-Jun.2013
- Top 10 Import Sources of Inactive Yeast in China by Country, 2012
- Export Volume and Value of Inactive Yeast in China, 2010-Jan.-Jun. 2013
- Top 10 Export Destinations of Inactive Yeast in China by Country, 2012
- Major Products of Angel Yeast and Their Applications
- Industrial Chain of Angel Yeast

- Basic Information of Angel Yeast's Subsidiaries
- Revenue and Net Income of Angel Yeast, 2007-2013
- Period Expense Ratio of Angel Yeast, 2007-2013
- Revenue of Angel Yeast by Product, 2007-2013
- Revenue Structure of Angel Yeast by Product, 2008-2013
- Revenue Structure of Angel Yeast by Region, 2009-2013
- Gross Margin of Angel Yeast, 2007-2013
- Gross Margin of Angel Yeast by Product, 2008-2013
- Gross Margin of Angel Yeast by Region, 2008-2013
- Revenue Structure of Angel Yeast's Yeasts and Deep-processed Products by Product, 2009-2012
- Yeast Capacity of Angel Yeast, 2006-2013
- Revenue and Gross Margin of Angel Yeast's Yeasts and Deep-processed Products
- Capacity Distribution of Angel Yeast, 2011-2013
- Planned Commissioning Projects of Angel Yeast, 2012-2013
- Angel Yeast's Revenue from Top 5 Clients and % of Total Revenue, 2009-2012
- Revenue, Gross Profit and Net Income of Angel Yeast, 2012-2015E
- Yeast Sales Volume of Angel Yeast, 2013-2015E
- Yeast (After Drying) Capacity of Angel Binzhou, 2007-2012
- Sales of Angel Binzhou, 2007-2012
- Capacity, Output and Sales Volume of Chifeng Angel, 2007-2009
- Assets and Liabilities of Chifeng Angel, 2007-2009
- Revenue and Profit of Chifeng Angel, 2007-2009
- Capacity, Output and Sales Volume of Yili Angle Yeast, 2007-2009
- Assets and Liabilities of Yili Angel, 2007-2009

- Revenue and Profit of Yili Angel, 2007-2009
- Product Prices of Yili Angel, 2007-2009
- Procurement Amount of Yili Angel's Top 5 Purchasers, 2007-2009
- Revenue and Net Income of Chongzuo Angel, 2008-2010
- Revenue and Operating Income of Associated British Foods' Ingredient Business, 2007-2012
- Subsidiaries of AB MAURI in China and Construction Expansion
- Capacity of AB NAURI's Subsidiaries in China
- Major Yeast Products of Meishan MAURI
- Main Operating Indicators of Meishan MAURI, 2007-2009
- Major Products of Harbin MAURI
- Main Operating Indicators of Harbin MAURI, 2007-2009
- Product Output of Hebei MAURI, 2008-2009
- Operating Revenue and Growth Rate of Hebei MAURI, 2007-2009
- Total Profits and Growth Rate of Hebei MAURI, 2007-2009
- Net Income and Growth Rate of Hebei MAURI, 2007-2009
- Major Products of Yantai MAURI
- Main Operating Indicators of Yantai MAURI, 2007-2008
- Main Operating Indicators of Xinjiang MAURI, 2007-2008
- Main Operating Indicators of Ziyang Biotechnology, 2007-2008
- Major Products of Jiangmen Biotechnology
- Revenue of Jiangmen Biotechnology, 2009-2012
- Major Products of Xiwang Yeast
- Major Products of Tailong Food
- Main Operating Indicators of Tailong Food, 2007-2008
- Major Products of Youyi Jiuding

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