

China Lactic Acid and Derivative Industry Report, 2013

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

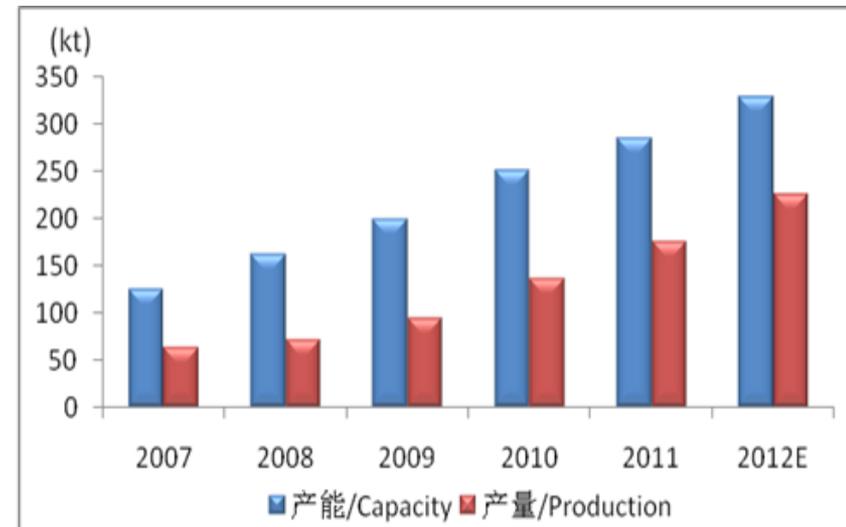
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

China's lactic acid capacity and output continued to grow at the respective CAGR of 22.7% and 28.7% in 2007-2011. But limited by market demand, the annual output of most vendors was below their designed annual capacity with a high idle capacity rate. In 2010-2011, China's idle annual capacity of lactic acid reached at least 110,000 tons. The capacity and output in 2012 were estimated to be 329,000 tons and 226,000 tons respectively, up 15% and 28.4% separately from 2011.

Henan Jindan Lactic Acid Technology and Chongqing Bofei Biochemical Products possess the largest lactic acid capacity in China. In 2012, their combined capacity of the two totaled 175,000 tons, equivalent to 53.2% of China's total lactic acid capacity. Each of other lactic acid enterprises seizes the capacity of 10,000-30,000 tons averagely.

China's Lactic Acid Capacity and Output, 2006-2012



Source: Wind; ResearchInChina China Lactic Acid and Derivative Industry Report, 2013

In China, the food and beverage industry is accustomed to use lactic acid in condiments, liquor brewery industry, milk processing and others. In 2012, the food and beverage industry consumed about 161,000 tons of lactic acid, accounting for 49.2% of China's total lactic acid consumption; 119,000 tons of lactic acid (36.1%) was applied to leather manufacturing, microelectronics, electroplating industry, polylactic acid production and other industrial fields.

By virtue of pollution-free, degradability and alternative properties (polylactic acid can replace petroleum-based materials excellently), polylactic acid has become one of the most potential derivatives in China lactic acid industry. With the completion of the technological transformation of most polylactic acid manufacturers and the operation of new production lines, China's polylactic acid capacity reached 85,500-102,000 tons in 2012. As a giant in China polylactic acid industry, Hisun Biomaterials attained the polylactic acid capacity of approximately 30,000 tons in 2012 and it is building one 20,000 t / a polylactic acid project.

The report covers the followings:

Competition pattern, market supply and demand and outlook of the global lactic acid and derivative industry;

Market supply and demand, competition pattern, outlook, and polylactic acid application prospect of China lactic acid and derivative industry;

Import and export of Chinese lactic acid and derivatives including polylactic acid, lactic acid, lactate salt and lactic ester ;

Operation of global lactic acid and derivative companies PURAC, GALACTIC, ADM and Cargill;

Operation of 15 Chinese lactic acid and derivative enterprises (including Hisun Biomaterials, COFCO Biochemical GALACTIC, Jindan Lactic Acid, Hypow Biotechnology, Bofei Biochemical Products, Kaifeng Bioengineering, Haijianuo Biological Engineering and Sanjiang Space Good Biotech).

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