China Yeast Industry Report, 2014-2017

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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.

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Abstract

During 2004-2013, China saw a continuous rise in yeast output, with a CAGR of 10.7%. Yeast is used mainly in bakery food, wine brewage, feed and other fields.

Given the fact that the demand for bakery food, wine brewing and feed continues to grow, we project that in 2014-2017 the demand for yeast from the said industries will present a steady growth. Additionally, as people pay much more attention to food safety, Yeast extracts will become the driving force in raising the yeast demand. However, restricted by the raw material supply, China's yeast output will grow by a small margin, with an estimated CAGR of around 4%.

Like the global market, China's yeast industry is dominated by oligarch companies, such as Angel Yeast, AB Mauri, Lesaffre and Biosunkeen. And the total capacity of the four yeast manufacturers accounted for more than 80% of the national total in China. As of May 2014, Angel Yeast had a capacity of 160 kt of Yeast and 41 kt of yeast extract, making it the largest supplier in China. AB MAURI owned a capacity of more than 50 kt of yeast in China, LESAFFRE close to 30kt of yeast and Biosunkeen approximately 20kt.

In China, molasses is used as the main raw materials to produce yeast. Between 2008 and 2013, the output of molasses in China approximated 4 million tons. But at present, molasses is primarily used to produce alcohol, as yeast manufacturers are limited, to a greater or lesser degree, by raw materials. To break this barrier, some enterprises, based on their own industry characteristics, use other raw materials as culture medium. For example, Biosunkeen chooses sweet potato sugar waste to produce yeast.

China Yeast Industry Report, 2014-2017 highlights the followings:

※ Supply and demand, competitive landscape, import & export, development prospects, etc of Chinese yeast industry;

※ Raw material supply, the demand from downstream sectors of Chinese yeast industry;

※ Operation, yeast business, etc of nine global and Chinese yeast companies.

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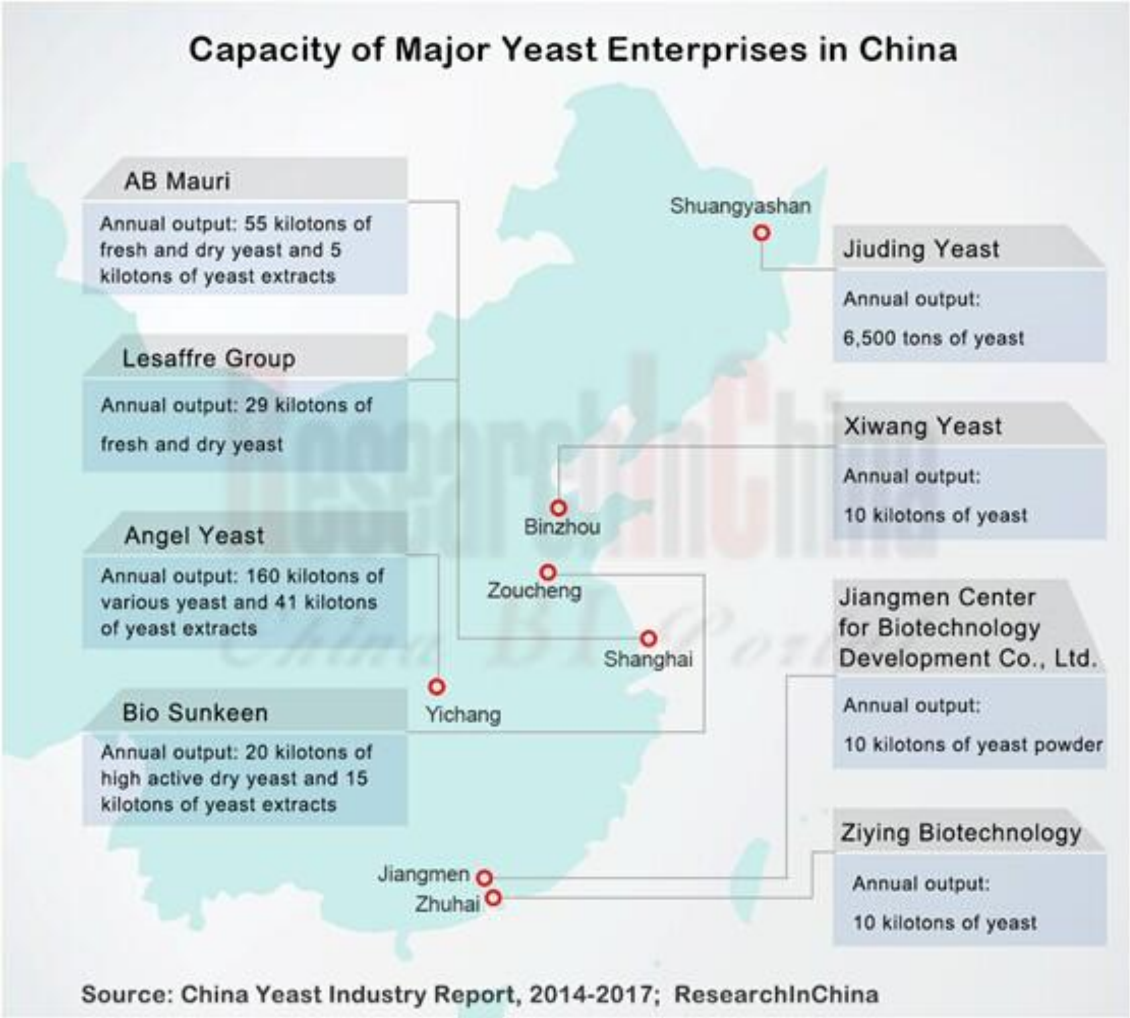
Capacity of Major Yeast Enterprises in China
AB Mauri
Annual output: 55 kilotons of fresh and dry yeast and 5 kilotons of yeast extracts
Lesaffre Group
Annual output: 29 kilotons of fresh and dry yeast
Angel Yeast
Annual output: 160 kilotons of various yeast and 41 kilotons of yeast extracts
Bio Sunkeen
Annual output: 20 kilotons of high active dry yeast and 15 kilotons of yeast extracts
Shuangyashan
Jiuding Yeast
Annual output:
6,500 tons of yeast
Xiwang Yeast
Annual output:
10 kilotons of yeast
Binzhou
Zoucheng
Shanghai
Yichang
Jiangmen Center for Biotechnology Development Co., Ltd.
Annual output:
10 kilotons of yeast powder
Ziying Biotechnology
Annual output:
10 kilotons of yeast
Jiangmen
Zhuhai
Source: China Yeast Industry Report, 2014-2017; ResearchInChina

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