



Global and China Industrial Enzyme Industry Report, 2014-2017

Jun. 2015

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

In recent years, the global industrial enzyme preparation market size increased year by year, registering a CAGR of 5%, approximating USD4.2178 billion in 2014. At present, the global industrial enzyme market is basically an oligopoly. In 2014, Novozymes, an industrial enzyme giant, accounted for a 44% market share while that for Dupont and DSM was 20% and 6%, respectively.

Regionally, Europe and North America have the largest demand for industrial enzyme, occupying nearly 80% in sharp contrast to some 9.4% in China.

Stimulated by the growing demand for enzyme preparations and favorable policies, China's industrial enzyme preparation output reached 1.1657 million tons in 2014. For years to come, industrial enzyme output will keep 10% growth rate, to 1.5487 million tons by 2017.

By introducing foreign advanced equipment, excellent strains, and new-type enzyme preparations, China has scored rapid development of enzyme preparation industry, especially the Chinese enzyme preparation enterprises. Currently, the enterprises with strong competitive power in China include VTR Bio-Tech, Youtell Biochemical, Smistyle, SunHY, etc.

As an enzyme preparation leader in China, VTR Bio-Tech has two subsidiaries: VTR Bio-Tech (Inner Mongolia) and Hunan Hong Ying Xiang Biochemistry (acquiring a 75% stake in 2014), with an annual capacity of 186,000 tons. In 2014, the company recorded revenue of RMB359.82 million and net income of RMB55.13 million (excluding that of Hunan Hong Ying Xiang). At present, VTR Bio-Tech (Inner Mongolia)'s 20,000 tons/a enzyme preparation project and Hunan Hong Ying Xiang's 140,000 tons/a enzyme preparation project have been jumpstarted.

Youtell boasts advanced R&D center in the United States and two large fermentation production bases in Hunan and Shandong, with the annual production scale approaching 80,000 tons but lower capacity utilization. In 2014, the company posted RMB153.9 million in revenue and RMB10.74 million in net income.

Global and China Enzyme Preparation Industry, 2014-2017 is all about the following:

- ✘ Development of global industrial enzyme industry, including market size, competition pattern, and demand structure;
- ✘ Development of China's industrial enzyme industry, including development history, policy environment, development status, import and export, and competition pattern;
- ✘ Development of downstream sectors of China's enzyme preparation industry, including food, feedstuff, brewing, detergent, papermaking, and textile industries;
- ✘ Four global and nine major Chinese industrial enzyme manufacturers, including their profile, operation, and their industrial enzyme business.

Major Enterprises of China Enzyme Preparation Industry, 2014

Company	Headquarters	Developments
	Denmark	As a global leader in industrial enzyme preparation, Novozymes represented a 44% market share in 2014. It entered the Chinese market in 1992, and now has 5 subsidiaries in mainland China and 2 in Hong Kong.
	Zhuhai	Guangdong VTR BIO-TECH Bio-Tech Co., Ltd. leads China's enzyme preparation industry. After acquiring Hunan Hong Ying Xiang Biochemistry Industry Co., Ltd in 2014, its total capacity reached 186 kt/a. And the 160 kt/a enzyme preparation project is under construction. In 2014, its output attained 20,336 tons, earning RMB359.8 million revenue.
	Yueyang	Youtell Biochemical Co., Ltd. has advanced strain R&D center in the United States and two large fermentation production bases in Hunan and Shandong provinces, with annual production scale approaching 80 kt, but the company's capacity utilization rate is not high. In 2014, revenue and net income came to RMB153.9 million and RMB10.74 million, respectively.
	Wuhan	Sunhy Group has 8 subsidiaries holding capacity of 30 kt/a. Its products have been registered in 20 countries, and been exported to Southeast Asia, the Middle East, East Europe, South America, etc.
	Yishui	Shandong Longda Bio-products Co Ltd has built Shandong Lonct Enzymes Co., Ltd and Changchun Longda Bio-products Co.,Ltd. It can produce 30 kt of enzyme preparations each year. It has 4 provincial R&D platforms and a national post-doctoral scientific research workstation, with products exported to the United States, Russia, Europe, Southeast Asia and other countries and regions.
	Qingdao	Vland Biotech Group owns 10 business divisions, 4 state-level research centers and 3 enterprise academician workstations. In 2014, it founded JBS-Vland Life Sciences in the United States, and conducted cooperation and communication with research institutes and enterprises in more than 20 countries.
	Yichuan	Sunson Industry Group has two production bases in Yinchuan and Cangzhou, and the third one has been started. Now, its enzyme preparation capacity totaled 4 kt/a.

Source: *Global and China Enzyme Preparation Industry Report, 2014-2017* by ResearchInChina

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