

Report on China Feed Enzyme Preparation Market

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Abstracts

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Abstract

this report gives a description of the status quo of China's feed enzyme preparation industry, and conducts an in-depth analysis into the status quo of supply and demand in China's feed enzyme preparation market as well as into major feed enzyme production enterprises.

Research Background

Functions of Feed Enzyme Preparation

Feed enzyme preparation is a new kind of bio-active feed additive, whose functional elements are mainly digestive enzyme, such as protease and amylase, and non-digestive enzyme, such as cellulose, xylanase and pectinase, etc. Feed enzyme added in the feed can remarkably improve digestibility and feed conversion efficiency, improve the daily gain of weight, reduce the meet-feed proportion, increase the nutrition intake by animals, reduce growth cycle, enlarge the consumption of coarse feed, reduce feed cost, and reduce the occurrence of animal diseases and environmental pollution.

Development of Feed Enzyme Preparation

The commercialized application of feed enzyme preparation in foreign countries has a history of only 20 years. In 1990s, there was almost no feed enzyme preparation added in chicken feed, but now over 95% chicken feed contains feed enzyme preparations. In 1992, Zhuhai VTR Bio-Tech Co., Ltd. developed VTR Enzyme, which is the beginning of the commercialized application of feed enzyme preparation in China. Therefore, the

application of feed enzyme preparation in China has a history of only over 10 years.

Currently, there are over 20 types of feed enzyme. Except the single enzyme preparation of phytase, most feed enzyme preparations are compound preparations containing a variety of enzyme types. The most applied preparations include: 1. compound enzyme preparation consisting mainly of cellulase and pectinase; 2. ??glucanase based compound enzyme preparations; 3. compound enzyme preparation consisting of protease and amylase; 4. compound enzyme consisting of cellulase, protease, amylase, glucoamylase, glucanase and pectinase.

The objects of global feed enzyme preparation industry statistics include both feed compound enzyme and feed phytase enzyme. In 2011, the global total output and sales volume of feed compound enzyme preparation was 219,200 tons, and the global total output and sales volume of feed phytase enzyme preparation was 128,800 ton.

According to the statistics of BOABC, China's output of feed enzyme preparations in 2011 was 91,900 tons, valued 1.56 billion Yuan in total. Of the total output, 50,600 tons are feed compound enzyme preparation products while 41,300 tons are feed phytase enzyme preparation products.

Feed Enzyme Preparation Producers

Currently, there are nearly 10 foreign enterprises selling feed enzyme preparation products in China, mainly including Danisco, Finnfeeds International, German AB ENZYMES, Adisseo, DSM, Alltech, BASF, and Kemin, etc. There are nearly 30 domestic feed enzyme preparation producers in China, mainly including Wuhan Sunhy Bio Co., Ltd., Challenge Group, Beijing Smistyle Sci. & Tech. Development Co., Ltd., Sunson Industry Group Co., Ltd., Hunan Youtell Bio-chemical Co., Ltd., Jiangyin Aidun Bio-tech Co., Ltd., Zhuhai VTR Bio-Tech Co., Ltd., and Guangdong Zhao Huafen Enzyme Co., Ltd., etc.

BOABC Viewpoints

In the future, with the improvement of enzyme preparation technology, the application and effect of feed enzyme preparation will be more remarkable. Meanwhile, with the increase of proportion of non-normal feed additives added in feed and the strengthening of people's awareness of food safety, the proportion of feed enzyme preparation added in feed will be higher and higher.

The feed enzyme preparation market is still growing and the market scale will enlarge, while the competition means will be diversified, changing from price-based competition into a wide range of emphasis on price, function, quality and service. The market structure is similar to that of monopoly competition.

Based on authoritative information from National Bureau of Statistics, China Feed Industry Association, and BOABC database, this report gives a description of the status quo of China's feed enzyme preparation industry, and conducts an in-depth analysis into the status quo of supply and demand in China's feed enzyme preparation market as well as into major feed enzyme production enterprises. BOABC believes that this report will serve as an important reference for domestic and foreign investment companies, industry associations, and research institutions as well as feed enzyme preparation enterprises in their strategic decision-making.

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