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# Feed Enzyme Market Study in China

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## Abstracts

China’s feed enzyme market has embraced a five-year fast growth since 2008 when the major production area of calcium hydrophosphate—Sichuan Province—was hit by a great earthquake, which highly reduced the domestic supply for feed production and pushed up the price of the product. Phytase, the key substitute for calcium hydrophosphate in feed, expanded its market share luckily.

However, the fast development of the feed enzyme market in the past did not rely on fortune. Feed enzymes can help breeding enterprises both in cost saving and environmental protection, which are two key issues to them. Now more and more feed enzymes are consumed in China; meanwhile, more and more capacity are launched.

However, compared with other mature markets in the world, such as the EU and the US, the feed enzyme industry in China is less competitive in the global market both in production and application technology, as well as technological services.

Then, how is the current situation of feed enzyme industry in China and what will the future holds?

CCM stands on the view of the global feed enzyme market and conducts an overall analysis of the feed enzyme market in China, covering the following aspects:

1. Overview of global feed enzyme market, 2008~2012
2. Analysis of feed enzyme market in China, 2008~2012
   Market volume and value
   Market share by products and key producers
   Price trend
   Key products
3. Analysis of 5 key feed enzyme producers in China, 2013

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# About

## Global market by geography

The EU and North America (especially the US) are the traditional markets of feed enzymeworldwide due to their high environmental awareness and requirements. However, thesemarkets are mature and maintain a slow-growing demand for feed enzyme in the past fiveyears. The application rate of enzyme in feed is high (for example, 90% feed for chickencontains enzyme in the EU) and the growth rate of demand for feed is small; meanwhile, theproduction of chicken, pork and milk in these two markets also keeps a low and even negativegrowth rate in the past five years.

## Price trend and influencing factors 2008~2012

The average market price of feed enzymes in China kept decreasing from 2008 to 2011, whichwas affected by the production scale expansion and intense competition in feed enzymeindustry. And then it rose slightly in 2012, thanks to the development and application of newproducts such as heat-resistant products.

Market competition degree and production technology are the most important factors thatinfluence the price trend of feed enzyme.

## Supply and demand situation

The price of feed enzyme has been largely affected by its supply and demand situation inChina. Though feed enzyme enjoys a huge potential market in China, the demand for it in feedindustry is limited at present. With the fast development of China' s feed enzyme industry,there were more and more new comers and the feed enzyme production scale had expandedquickly in the past few years, which resulted in intense competition in the industry. The price ofboth phytase and compound enzyme had dropped largely in the past few years because of theintense competition in the domestic market. As the improvement of acceptance and costadvantage of feed enzyme over calcium hydrophosphate in the feed industry, the feed enzymemarket had enlarged gradually, which had contributed to the rebound of feed enzyme pricebecause of the relief of competition pressure.

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