

Sodium Gluconate and Glucono Delta-Lactone's Major Producers Capacity and Output in China in 2021

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Abstracts

Sodium gluconate (SG), the sodium salt of gluconic acid, is used in concrete additive, water quality steadying agent, food and electroplating detergent industries in China. Glucono-delta-lactone (GDL) is a harmless food additive to the human body. During the past two years, these two industries have seen increasing output and consumption in China.

Sodium gluconate

As of Dec. 2021, there were five manufacturers with sodium gluconate capacity exceeding 100,000 t/a, including Shandong Fuyang, Zhucheng Xingmao, Baisheng Biotechnology, Xiwang Sugar and the newcomer Yuxing Biotechnology. In 2017–2021, the output of sodium gluconate in China grew at a CAGR of 2.0%, reaching 701,400 tonnes in 2021. The output of the top five SG producers in 2021 accounted for 82.98% of total SG output in China, which was 5.44% lower than that of 2020.

In 2021, the full-year ex-works price of sodium gluconate was above USD660/t as USD/CNY continued to weaken. The price surpassed USD700/t in Q4 and reached USD779/t in Nov. as the price of corn starch rose.

As to SG production technology, the enzyme method has become the mainstream technology thanks to no fungal residue and less energy consumption.

Glucono-delta-lactone

As of Dec. 2021, there were seven active GDL producers in China. The capacity of the top three producers accounted for 60.66% of the national total. Thanks to increasing

demand abroad and profitable sales, the output of GDL in China grew at a CAGR of 2.34% from 2017 to 2021, reaching 34,000 t/a in 2021. From 2018 to 2021, China's GDL operating rate remains between 55%–60% (except for 2020).

In 2021, annual average ex-works price of GDL reached USD1,687/t, rising 19.22% year on year.

There are four methods for GDL production, namely fermentation method, catalytic oxidation method, glucose oxidase method and electrolytic oxidation method, with glucose or starch as starting material.

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