

China Corn Deep Processing Industry Report, 2013-2015

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Abstracts

In recent years, the production capacity of corn deep processing has seen rapid expansion in China; and the output of corn starch particularly as the main intermediate of the industry has presented robust growth. In 2012, China's output of corn starch registered 21.223 million tons, a 1.9% rise from a year earlier and a substantial increase of 25.9% from 2008, and with a higher growth rate than corn output.

The corn deep-processed products in China are dominated by starch & starch sugar, alcohol, glutamic acid, lysine, citric acid, etc; and the products like corn oil and polyol arouse growing attention. Yet, there is a shortage of investment into such products as modified starch and methionine. In a bid to adjust industry structure, Chinese Government carries control on total production capacity of the products like alcohol, sodium glutamate and citric acid, and promotes the development and application of the products such as amino acid (excluding lysine and glutamic acid), polyol, and functional fermented products.

During 2008-2013, the gross margin of Chinese corn deep-processing enterprises kept at 10% or so, a figure not quite high, and with lower added value than the foreign products of the same kind. In the period since 2011, the net income of listed companies in China corn deep processing industry without exception dropped as exposed to global economic situation, prices of raw materials as well as adjustments in industrial policy, etc.

To cope with predicament, parts of Chinese enterprises have made progress in the development of the products with high added value. China Starch tapped into modified starch business in 2012, and its revenue from such operations in H1 2013 took a rising proportion from 0.6% to 6.7% of total revenue. As a leader in Chinese gourmet powder

(sodium glutamate) industry, Fufeng Group began to conduct small-variety amino acid business in 2010, and in H1 2013 its revenue from threonine and branched chain amino acid accounted for a share up to 3.9% of total revenue. Longlive Bio-technology, which is a leading enterprise in new-type starch sugar, generated more than 50% of its revenue from functional sugar during 2008-2013, and the gross margin of functional sugar remained above 40%.

It is anticipated that the operating revenue of corn deep-processing enterprises will maintain growth momentum but see a fall in profit level from 2013 to 2015. From 2015 as estimated, the profitability of corn deep-processing enterprises will be improved to some extent.

The report sheds light on the following:

20120114.gif Policies, supply of raw materials, competition pattern, etc in China corn deep processing industry;

20120114.gif Output, import & export and price trend of segmented products (involving corn starch, saccharified products, hydrogenated products, fermented products, polyol, corn oil, modified starch, etc) of China corn deep processing industry and operation of industrial players;

20120114.gif Operational performance, business analysis, development and so forth of 11 global and Chinese corn deep-processing enterprises;

20120114.gif Prediction of policy environment for and development prospects of China corn deep processing industry during 2013-2015

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