

China Feed Amino Acid Industry Report, 2012-2013

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Abstracts

In the feed industry, amino acid is an important nutritional additive whose main role is to compensate for the lack of amino acids in feed. Most widely used feed amino acid comprises lysine, methionine, threonine and tryptophan etc.

In recent years, benefiting from the push of the downstream feed industry and technology introduction through joint venture, China's feed amino acid industry has embraced rapid development. In particular, China's output and consumption of lysine as the most consumed feed amino acid in China approximated 855,000 tons and 610,000 tons respectively in 2012, rising by 14% and 22%. Chinese lysine market is highly concentrated and dominated by several manufacturers including Changchun Dacheng, Ningxia Eppen, COFCO Biochemical (Anhui), Meihua and CJ (Liaocheng) with total market share of nearly 79% in 2012.

Duo to the limitation of technical barriers, China's homemade methionine developed slowly before 2010. Through independent innovation and M&A, the homemade methionine has seen significant progression over last three years. Chongqing Unisplendour Chemical launched the first homemade methionine project in 2010 with an initial capacity of 10,000 tons; and in 2012, Unisplendour's capacity hit 60,000 tons. China National BlueStar launched the 140,000 tons liquid methionine project in Nanjing in 2010 through technical introduction from its subsidiary-Adisseo, and the first-stage project started operation in 2012.

Though the localization of methionine has achieved some progresses, but China's methionine still relies on imports. The actual methionine supply (including imports) was about 193,700 tons and import volume? 133,473 tons in 2012. Imported methionine accounts for close to 69% of the total supply. Most of China's methionine is imported from Degussa, Sumitomo, Adisseo and Novus.

This report resolves around the followings:

1. supply and demand, competition pattern, development prospects, etc of Chinese feed amino acid market;
2. Development status, import & export, price trend, market supply and demand as well as development prospects of China's subdivided feed amino acid products (lysine, methionine, threonine and tryptophan, etc.);
3. Operating performance and business analysis of 2 feed methionine companies, 4 lysine companies and 3 other feed amino acid companies in China.

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