



Research and Investment Value on China Yeast Industry, 2014-2018

(Sample)

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3. Status Quo of Yeast Industry Development in China

3.2 Competition Situation of Yeast Industry in China

3.2.1 International Competition

In 2013, Lesaffre's annual revenue exceeded EUR 1.56 billion, products spread over 180 countries, and there were more than 70 branches in over 40 countries; AB Mauri belongs to a division of ABF. In 2013, ABF's annual revenue hit GBP 13.3 billion, and ABF had 42 manufacturers in 25 countries. Angel Yeast Co., Ltd takes as high as 50% market shares in China, the capacity of Angel Yeast Co., Ltd ranked No.3 in global, while the YE (yeast extract) ranked No.1 in global. As the largest yeast manufacturer in global, Lesaffre's global capacity is about 300,000 t, the capacity of YE is 45,000 t, in which, the yeast capacity in China is about 50,000 t and the YE is 10,000 t. As the second largest yeast manufacturer, AB Mauri's global capacity is about 250,000 t, in which the yeast capacity in China is about 40,000 t.

Tab.8: Main Yeast Manufacturers in Global

Manufacturers	Country	Capacity	Overview
LESAFFRE	France	300,000 t	There are more than 70 branches in over 40 countries. the yeast capacity in China is about 50,000 t and the YE (yeast extract) is 10,000 t.
AB MAURI	England	250,000 t	In 2004, AB Food established AB MAURI by purchasing the yeast baking business of MAURI Fermentation Company, subordinated to BURNS PHILP Group in Australia and restructuring with original additive business. At present, the capacity in China is about 40,000t.
Angel Yeast Co., Ltd	China	160,000 t	Besides the headquarters in Yichang, Angel Yeast Co., Ltd has built production bases in Yili in Xinjiang, Chifeng in Inner Mongolia, Chongzuo in Guangxi, Binzhou in Shandong, Hui County in Henan and Cairo in Egypt.
LALLEMAND	Canada	100,000 t	It has been owned by Chagnon family since 1952, and has entered into the markets in US, Mexico and Europe successively since 1970 and purchased one large-scale yeast factory in South Africa in 2006.

3.2.2 Domestic Competition

As for the yeast market in China, the ratio of market shares of Angel Yeast, LESAFFRE and AB MAURI is about 6:2:2. As for terminal channel, Angel Yeast has strong control power. In respect of industrial customers, the later two acquire market mainly by low price. Although the original General Manager of Angel Yeast left for Biosunkeen, it was known that Biosunkeen had not conducted free capacity production as of October 2014, and the technology of producing molasses by cassava has not succeeded, it is hard to compete with Angel Yeast Co., Ltd. In respect of YE (yeast extract), with the shutdown of 30,000 t capacity by AB MAURI in Harbin, Angel Yeast Co., Ltd unifies the whole market in China basically.

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