

Production and Market of Wheat Gluten in China

The Second Edition

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Researched & Prepared by:

Kcomber Inc.

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Contents

Executive summary.....	1
Methodology.....	2
1 Production of wheat gluten in China, 2015–2017.....	3
1.1 Overview of production of wheat gluten in China	3
1.2 Capacity and output of wheat gluten in China, 2015–2017	3
1.3 Raw materials of wheat gluten	3
1.4 Influencing factors of wheat gluten production in China	5
1.4.1 Drivers.....	5
1.4.2 Barriers	6
1.5 Production process	7
2 Information of major producers	9
3 Consumption pattern of wheat gluten in China, 2017.....	13

LIST OF TABLES

Table 1.2-1 Capacity and output of wheat gluten in China, 2015–2017

Table 1.3-1 Average protein content of wheat in major wheat production regions in China, %

Table 1.3-2 The production and planting of wheat in China, 2015–2017

Table 2-1 Capacity and output of major wheat gluten producers in China, 2015–2017

Table 3-1 Consumption of wheat gluten by end-use segment in China, 2017

LIST OF FIGURES

Figure 1.5-1 Flowchart of horizontal three-phase separator process for wheat gluten production

Figure 1.5-2 Flowchart of Martin process for wheat gluten production

1. Introduction

Research scope and targets

Target: This report aims to discover the situation of production and producers, raw materials, production process, influencing factors, as well as consumption pattern of wheat gluten in China.

Region scope: China

Time scope: 2015–2017

2. Approach for this report

This report is based on a detailed interview program supported by an extensive desk research. Information obtained has been incorporated in the report.

- **Telephone interview & online communication**

CCM carried out in-depth telephone interviews and online communications with wheat gluten producers, traders and its end users to know the production and market situation.

- **Desk research**

The sources of desk research are various, including published magazines, journals, government statistics, industrial statistics, customs statistics, association seminars as well as information from the Internet. A lot of work has been undertaken to compile and analyse the information obtained.

- **Data processing and presentation**

The data from verified information, telephone interviews and the secondary data from all of the publications have been combined to make this report as precise and scientific as possible. Throughout this process, a series of internal discussions took place in order to analyse the data and draw conclusions from them. When necessary, industrial experts and active researchers have been consulted to clarify the findings.

3. Executive summary

As an important producer of wheat gluten worldwide, China's capacity of wheat gluten has kept climbing in recent years. 2017 saw the country produce XXX tonnes of wheat gluten in total, with overall capacity of XXX t/a. Most of the products were exported to Southeast Asia, South America, Europe, Australia and the US.

Major producers of wheat gluten, led by XXX Co., Ltd., are mainly distributed in the key wheat-producing regions such as Henan, Shandong, Hebei and Anhui. Most of the producers are using the Martin process or the horizontal three-phase separator process.

In addition, China's consumption of wheat gluten has also been growing in recent years. The total consumption of wheat gluten in China was about XXX tonnes in 2017, with XXX% went to foods. In food industry, wheat gluten is mainly consumed in XXX and XXX. Wheat gluten is also used in feed industry, as a basic material for high-class aquaculture feed. Thanks to an increasing domestic demand from downstream industries, China's total consumption of wheat gluten will keep its uptrend in the next few years.

4. What's in this report?

Note: Key data/information in this sample page is hidden, while in the report it is not.

1 Production of wheat gluten in China, 2015–2017

1.2 Capacity and output of wheat gluten in China, 2015–2017

In general, from 2015 to 2017 the total capacity of wheat gluten in China kept increasing, pushed up by the climbing demand from wheat starch, fuel ethanol and food industries. However, the output volume and output value of wheat gluten in China has been declining for three consecutive years, mainly due to the continually decreasing demand overseas. Specifically, the exported volume dropped by XXX% and XXX% in 2016 and 2017 respectively, on a yearly basis. In addition, stricter environmental protection inspections also lead to a low operating rate of wheat gluten.

In 2015–2017, the capacity, output volume and output value of wheat gluten in China increased with CAGRs of XXX%, XXX% and XXX% respectively.

Table 1.2-1 Capacity and output of wheat gluten in China, 2015–2017

Year	Capacity, t/a	Output, tonne	Output value, million USD
2015	XXX	XXX	XXX
2016	XXX	XXX	XXX
2017	XXX	XXX	XXX

Source: CCM

2 Information of major producers

Table 2-1 Capacity and output of major wheat gluten producers in China, 2015–2017

No.	Producer	Abbreviation	Location	Parent company	Type of business	Status in the end of 2017	Capacity, t/a			Output, tonne		
							2017	2016	2015	2017	2016	2015
1	Henan Tianguan	XXX	Henan	XXX	State-owned	XXX	XXX	XXX	XXX	XXX	XXX	XXX
2	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
3	Lotus Health	XXX	Henan	/	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
5	Nantong Lianhai Weijing	XXX	Jiangsu	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
...
21	Anhui Bilvchun	XXX	Anhui	/	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Others							XXX	XXX	XXX	XXX	XXX	XXX
Total							XXX	XXX	XXX	XXX	XXX	XXX

Source: CCM

✓ Henan Tianguan Group Co., Ltd. (Henan Tianguan)

Henan Tianguan was established in 1997. The company produces fuel ethanol as well as the co-product wheat gluten. During 2015–2016, Henan Tianguan was the largest producer of wheat gluten domestically with capacity of XXX t/a. Over XXX% of its wheat gluten was exported to the US, Southeast Asia, South America, Australia and Europe.

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3 Consumption pattern of wheat gluten in China, 2017

In general, the total consumption of wheat gluten in China reached about XXX tonnes in 2017, with XXX% went to foods—the largest application field of wheat gluten. XXX industry is the second largest application field of wheat gluten, accounting for about XXX% of the total consumption.

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Table 3-1 Consumption of wheat gluten by end-use segment in China, 2017

End-use segment		Consumption, tonne
Food	Instant dry noodle	XXX
	Bread	XXX
	Instant wet noodle	XXX
	Other foods	XXX
Feed		XXX
Total		XXX

Source: CCM

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If you want more information, please feel free to contact us

Tel: +86-20-37616606 Fax: +86-20-37616968

Email: econtact@cnchemicals.com