

Business Review
Bakery Ingredients and Intermediates
 CHINA
 2021 – 2026

INTRODUCTION	<p>While, in both bread and pastry sectors, the consumer wishes no 'apparent' change in the end-products due to the traditional nature of the industry, ingredient producers have been at the forefront of a technological change. Pressures to simplify processes at the bakers' premises have offered new opportunities to ingredient suppliers, and yet enabled bakers to keep a tight leash on costs. Recently vegan, ancient grains, natural additives, GMO and enzymes, among others have become global issues facing the intermediate producers.</p> <p>China is a complex country with regional variance in production and demand. The southern and eastern parts of the country are clusters for western style bakery product manufacture and consumption. Supply chains are complex due to the fragmented nature of retail, climate and logistics issues, which require stringent tracking and impose price sensitivity. Price sensitivity has also increased due to the impact of COVID-19. The major products are mantou/steamed bun (this product accounts for 60 to 70% of total wheat flour consumption) and dumplings. It is impressive to note the recent increase in the industrial production of all these products. Following its earlier very successful study on bakery mix/improver markets covering China in 2016, Giract, the international ingredients and technologies specialist, now proposes to cover the Chinese market once again in the current study.</p>
OBJECTIVES	<p>The key objectives of this report are:</p> <ul style="list-style-type: none"> • A review of current and potential products, their specifications, applications • An analysis of the producers, their market shares, and exports • An appreciation of "why" and "why not" concerning the key products based on interviews with producers and retailers/food service users across the countries of scope • An evaluation of the impact on the industry by such new and on-going factors such as vegan/vegetarian, GMO, no-additive/clean label, natural, sustainable, etc. • An estimation of the current (2021) market size by product group, sector, country, and forecasts of demand volumes and values for 2026
PRODUCTS	<p>Both key scratch ingredients and will be covered as follows:</p> <ul style="list-style-type: none"> • Margarines: vegetable fats for use baked-goods • Enzymes: bakery enzymes such as alpha-amylase, glucose oxidase, xylanase, lipase, etc. • Emulsifiers: dough strengtheners and dough softeners • Improvers: flour correctors/improvers with emulsifiers, enzymes, preservatives, etc. Dosed up to 5% of the weight of the final dough. May contain flour as a filler • Pre-mixes: ready-to-use mixes with part (typically 50-80%) flour addition. May sometimes not contain flour and have dosage as low as 5-10% depending on the recipe. • Mixes: ready-to-use complete mixes • Sourdough: ready-to use starters and mixes
SECTORS	<p>Bread: loaves, rolls, steamed buns, bagels, etc.; Traditional products: mantou/steamed bun, dumplings; Laminated items: croissants, Danish, savory puff pastry; Frozen dough: ready-to-bake bread, steam-bun, etc.</p>
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