

Enzymes and other proteins are part of everyday life



Source: Freedonia Group, Frost & Sullivan, Verenium press releases, equity research, company estimates Note: Market size numbers represent latest available currit global estimates, urless othenvise indicated 'U S market size only: Total market for bio-based chemicals, 'Propriedd 2022 celluties: biotexis enzyme market

•Enzymes

- The term "enzyme" was first coined by Kuhne in 1877 meaning "in yeast
- Buchner referred to the glycolytic enzyme complex as "zymase, "meaning "the enzyme of yeast itself."
- Enzymes became valuable in manufacturing because of their rapid and efficient action at low concentrations under mild pH values and temperatures, their high degree of substrate specificity (which reduced side - product formation), their low toxicity, and the ease of terminating their action by mild treatments





Enzymes

- In the 1980s and 1990s, microbial enzymes were increasingly used for applications whic traditionally employed plant and animal enzymes
- These shifts included the partial replacement of:
 - amylases of malted barley and wheat in the beer, baking, and textile industries by amylases from Bacillu and Aspergillus;
 - plant and animal proteases by Aspergillus protease for chil proofing beer and tenderizing meat;
 - pancreatic proteases by Aspergillus and Bacillus protease. for leather bating and in detergent preparations; and
 - calf stomach rennet (chymosin) by Mucor rennins for cheese manufacture.

Enzymes

Important industrial enzymes included the following:



- glucose isomerase for production of high - fructose corn sirup;
- penicillin acylase for production of semi - synthetic penicillins;
- peroxidase for manufacture of phenolic resins (which could replace synthetic phenol formaldehydes); and
- Nitrile hydrolase for hydration of acrylonitrile to acrylamide

Glucose isomerase

- Glucose isomerase was used in conjunction with a - amylase and glucoamylase to convert starch to mixtures of glucose and fructose known as " high fructose corn syrup.
- •" The development of glucose isomerase permitted the corn wet milling industry to capture 30% of the sweetener business from the sugar industry in the 1970s.
- In the United States alone, high fructose corn syrup is produced at 30 billion pounds per





industrial enzyme market

Recombinant

- Over 50% of the market is provided by recombinant processes
- Sixty per cent of the calf rennin (chymosin) used for cheese making in the United States is supplied by recombinant E. coli and the two lipases used industrially (i.e., Humicola lipase produced in Aspergillus and Pseudomonas lipase) are both recombinant
- Plant phytase (produced in recombinant A. niger) is used as a feed for 50% of all pigs in Holland. A 1000 - fold increase in phytase production was achieved in A. niger by use of recombinant technology.

Recombinant

- Scientists at Novo Nordisk have isolated a very desirable lipase for use in detergents from a species of *Humicola*.
- For production purposes, the gene was cloned into A. oryzae where it produced 1000
 fold more enzyme
- Over 60% of the enzymes used in the detergent, food, and starch processing industries are recombinant products

