

China MPEG (Methoxy Polyethylene Glycol) Industry Chain Report, 2009-2010



Stimulated by the downstream demand and the revitalization & upgrading of China fine chemical industry, China MPEG industry has experienced continuous development. At present, domestic-funded enterprises such as Liaoyang Oxiranchem Group Co., Ltd., Liaoning Kelong Fine Chemical Co., Ltd., Zhejiang Huangma Chemical Industry Group Co., Ltd., and Shanghai Taijie Chemical Co., Ltd., etc. are of industrialized production scale and take a lion's share of domestic polycarboxylates high performance water-reducing admixture industry. However, limited by factors like technology, the demand of MPEG in fields like medicine, cosmetics, laboratory, etc. still depends mostly on products imported from Korea Yukong Limited Co., Ltd., USA Huntsman, USA Clariant, USA Dow Chemical, Nippon Shokubai, Germany Cognis, Germany BASF, etc. From the perspective of both development trend and policy trend of Chinese MPEG upstream & downstream industries, there remains a broad development prospect for China MPEG industry.

First of all, the output capacity of Chinese epoxy ethane has been increasing rapidly in recent years. China currently possesses more than 10 sets of epoxy ethane production equipment, and most of which are for co-production of epoxy ethane and ethylene glycol; nevertheless, affected by the huge import of low-priced ethylene glycol from the Middle East and the restructuring of domestic petrochemical industry, the output capacity of merchandised epoxy ethane in China keeps growing. Up to April, 2010, the output capacity of realizable merchandised epoxy ethane in China has reached one million tons or so; and it has become increasingly evident that all the large manufacturers in China raise the product proportion of epoxy ethane/ ethylene glycol co-production equipment. What's more, those new epoxy ethane projects will finish construction and put into production successively, the future supply of merchandised epoxy ethane output turns out to be relatively sufficient, but its market price is with limited growth margin and is likely to fall.

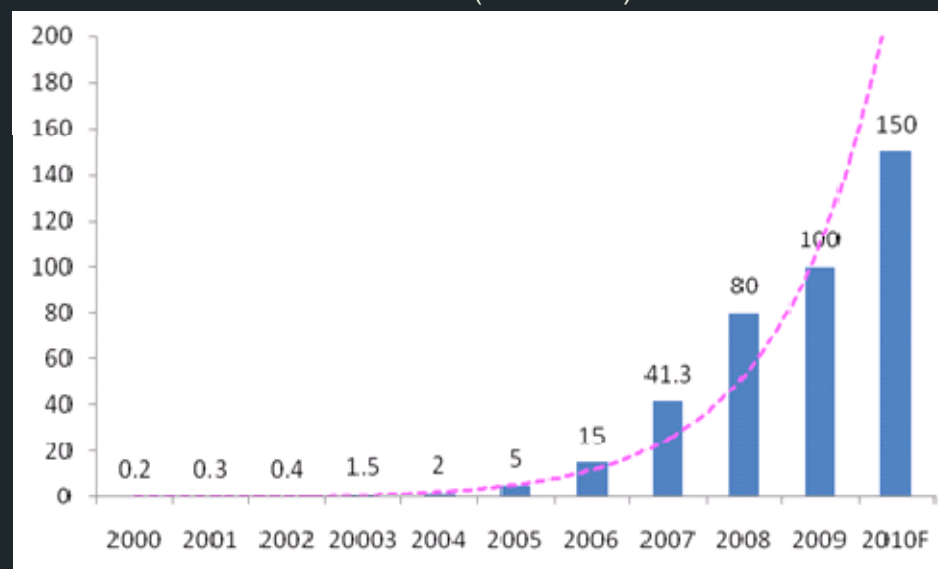
Secondly, the active growth of industries such as polycarboxylates based high performance water-reducing admixture, medicine manufacturing, and daily cosmetics will largely promote the rapid development of MPEG industry. Take polycarboxylates based high performance water-reducing admixture as an example. The application volume of polycarboxylates based high performance water-reducing admixture before 2005 was relatively small, less than 50 kilotons per annum. But ever since 2006, the industry has boomed under the drive of national relevant policies. The annual average growth rate of its consumption reached 60.7% during 2006-2009, and hit as high as 1 million tons or so in 2009, increasing by twentyfold compared with 2005. Along with the advancement of infrastructure projects like high-speed railway construction, civil aviation airport, subway construction in large & medium cities, southwest hydroelectric project, etc., promisingly, the market demand for polycarboxylates based high performance water-reducing admixture in 2010 can reach 1.50 million tons, as the main stream polyether monomer in the polycarboxylates based high performance water-reducing admixture industry, MPEG possesses the huge development space.

Output Capacity of Main Epoxy Ethane Manufacturers in China, 2009-Apr. 2010 (Unit: 10Kt)

Manufacturer	EO Capacity	Output EG Capacity	Output Remark
Yanshan Petrochemical	1.4	8.0	SD Technology
Beijing Eastern Chemical	2.4	4.5	SD Technology
SINOPEC Tianjin	3.8	6.3	Shell Technology
	4	36	Put into operation in Jan. 2010
Liaoyang Chemical Fiber	6.2	26	UCC Technology
CNPC Fushun	3.0	5.2	Shell Technology
CNPC Jilin EG Plant	—	15.9	SD Technology
Jilin Jilian	6.0	—	SD Technology
YPC	10.2	26.2	SD Technology
SINOPEC Shanghai	13.6	61	SD Technology
RASF-YPC	—	30	RASF Technology
Jiaxing Sanjiang Chemical	12	—	SD Technology
Suzou Biochemical	2.0	—	Raw material: corn starch
MPCC	6.0	8.0	Shell Technology
CNOOC and Shell Petrochemicals	2.2	32.0	Shell Technology
Dushanzi Ethylene	—	5.0	SD Technology
Zhenjiang Refining & Chemical	10.0	65	Put into operation in Dec. 2009
Liaoning North Chemical	10.0	15.8	Apr. 2010
Total	92.8	344.9	

Source: ResearchInChina

Consumption of Polycarboxylates Based High Performance Water-reducing Admixture in China, 2000-2010E (Unit: 10Kt)



Source: ResearchInChina

Lastly, MPEG belongs to fine chemical industry. According to Guide for Industrial Structure Readjustment (2007 revision) released by National Development and Reform Commission, the production of exclusive-use fine chemicals falls into encouraged industries. Development Guidelines of Chemical Industry during the 11th Five-Year Plan Period also takes fine chemical as one of the 6 fields enjoying preferential development during the 11th Five-Year Plan period, and lists fine chemical products like surfactant, etc. as the priorities of technology development & industrialization of fine chemical during the 11th Five-Year Plan. In accordance with the Petrochemical Industry Revitalization Program issued in the first half of 2009, China will strengthen the efforts to fuel the output capacity construction of high-end chemical products and will offer special support both in policy and capital.

In addition, from the perspective of the national energy saving & emission reduction policy, high technology, high added value, and low energy consumption shape the main stream of the future development of chemical industry, yet the development of MPEG industry exactly conforms to the practice of energy saving & emission reduction policy.

Based on the status quo of China MPEG industry, this report highlights the development environment, upstream industry, downstream industry, key enterprises, development trend & strategy, etc. of MPEG industry, fully revealing current situation of MPEG industry and the potential demand & opportunity of MPEG market.

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