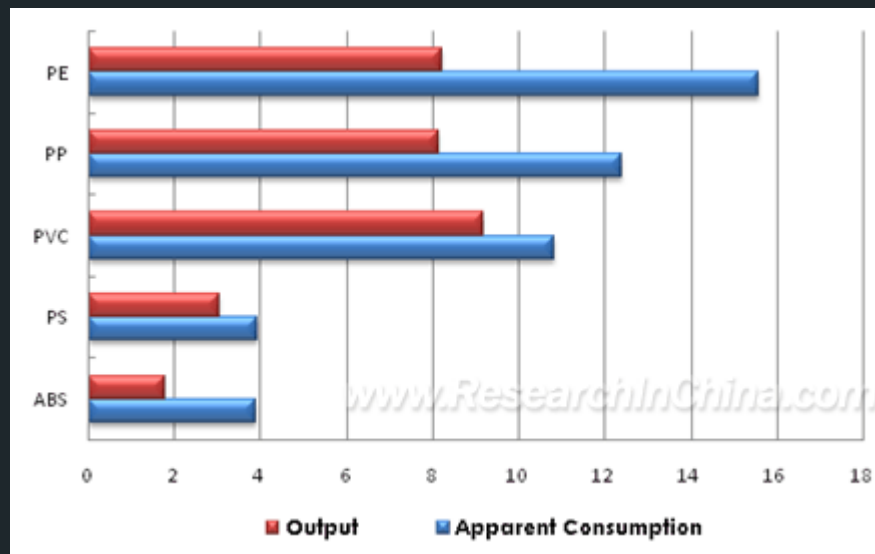


## China Resin Industry Report, 2009-2010



In spite of rapid growth in China's capacity of synthetic resin in the recent two years, the ever increasing market demand is still far from being satisfied. In 2009, the self-sufficiency ratio of top five resins was only 65%, elaborately, that of PS was 76.9%; PP 65.6%; PE 52.7%; and ABS 45.6%. Of them, ABS featured a lower self-sufficiency rate, and the ABS capacity of Chinese manufacturers just accounted for around 30% of total ABS capacity of all manufacturers in China.

## Output and Apparent Consumption of Top Five Synthetic Resins in China, 2009 (Unit: mln tons)



Source: ResearchInChina

It is the shortage of the raw material ethylene products that leads to the general inadequacy of synthetic resin supply in China. As many ethylene equipments successively put into production in recent two years, the short supply of synthetic resin raw materials will be eased, and the self-sufficiency rate of synthetic resin in China will keep improving in the future. In addition to insufficient capacity, Chinese synthetic resin industry is characterized by a low technology level, poor quality of products with low added value, as well as inferior competitiveness in comparison with the overseas.

The report not only resolves around the development of synthetic resin in China and the world, but also underlines the supply, demand, supply & demand balance, import & export and prices of top five synthetic resins, and at length analyzes the major resin manufacturers at home and abroad.

Taking PE resin with the largest apparent consumption for example, the capacity and output reached 8.865 million tons and 8.21 million tons respectively in 2009, and the apparent consumption hit 15.59 million tons, with the market shares of China-made products merely accounting for 52.7%. Among Chinese PE resin manufacturers, SinoPec subordinates held a 44.9% share in terms of capacity, followed by the subsidiaries of PetroChina with a 35.6% share, and other companies including local petrochemical companies and joint ventures occupied 19.5%. Sinopec Zhenhai Refining & Chemical Company and Shenhua Baotou Coal-Olefin Polyethylene Device have put into production in 2010, and then three to four million tons of PE will be rolled out in China during 2010-2012.

### Capacity and Time to Put into Production of Major New PE Equipments, 2010

Company	Capacity (1,000 tons)	Equipment Type	Time to Put into Production
Sinopec Zhenhai Refining & Chemical	450	LLDPE	Succeed in Pilot Run in Mar, 2010
Shenhua (Baotou)	300	-	Succeed in Pilot Run in Jul, 2010
Daqing Petrochemical	300	FDPE	2011
Wuhan Ethylene	300	HDPE	2012
	300	FDPE	2012
Guangzhou Nansha	450	LLDPE	2012
PetroChina Fushun Petrochemical	700	LLDPE: 450, HDPE: 350	2012
Sichuan Ethylene	300	HDPE	2012
	300	FDPE	2012

Source: ResearchInChina

# Table of Contents

- **1 Overview of Resin Industry**
  - 1.1 Resin
    - 1.1.1 Definition
    - 1.1.2 Classification
  - 1.2 Properties & Application
- **2 Development of Synthetic Resin Industry**
  - 2.1 Global Synthetic Resin Market
  - 2.2 China Synthetic Resin Market
    - 2.2.1 Output
    - 2.2.2 Demand
    - 2.2.3 Import & Export
    - 2.2.4 Price
- **3 Development of China PE Industry**
  - 3.1 Global PE Market Overview
  - 3.2 China PE Market Overview
    - 3.2.1 Production
    - 3.2.2 Import & Export
    - 3.2.3 Demand
    - 3.2.4 Balance between Supply and Demand
    - 3.2.5 Price
- **4 Development of China PVC Industry**
  - 4.1 PVC Industry Overview
  - 4.2 PVC Market
    - 4.2.1 Production
    - 4.2.2 Demand
    - 4.2.3 Import & Export
    - 4.2.4 Price
  - 4.3 Factors Influencing PVC Industry Development
- **5 Development of China PP Industry**
  - 5.1 Production
    - 5.1.1 Capacity
    - 5.1.2 Output
  - 5.2 Import & Export
  - 5.3 Consumption

- 5.3.1 Consumption Volume
- 5.3.2 Consumption Structure
- 5.4 PP Price
- 5.5 Problems & Suggestions

## • **6 Development of China PS Industry**

- 6.1 Production
- 6.2 Demand
- 6.3 Import & Export
- 6.4 Price
- 6.5 Problems & Suggestions
  - 6.5.1 Problems
  - 6.5.1 Suggestions

## • **7 Development of China ABS Industry**

- 7.1 Production
- 7.2 Import & Export
- 7.3 Consumption
- 7.4 Balance between Supply and Demand
- 7.5 Price
- 7.6 Suggestions

## • **8 Other Segmented Markets**

- 8.1 Epoxy Resin
  - 8.1.1 Profile
  - 8.1.2 Market
- 8.2 Polyurethane Resin
- 8.3 Unsaturated Polyester Resin
- 8.4 Polycarbonate Resin

## • **9 Major Foreign Companies**

- 9.1 Dow Chemical
  - 9.1.1 Profile
  - 9.1.2 Operation
  - 9.1.3 Development in China
- 9.2 BASF
  - 9.2.1 Profile
  - 9.2.2 Operation
  - 9.2.3 Development in China
- 9.3 Exxon Mobil
  - 9.3.1 Profile
  - 9.3.2 Operation
  - 9.3.3 Development in China

- 9.4 Bayer
  - 9.4.1 Profile
  - 9.4.2 Operation of Bayer Material Science
  - 9.4.3 Development of Bayer Material Science in China
- 9.5 DuPont
  - 9.5.1 Profile
  - 9.5.2 Operation
  - 9.5.3 Development in China
- **10 Key Chinese Companies**
  - 10.1 Sinopec Qilu Petrochemical Co., Ltd
    - 10.1.1 Company Profile
    - 10.1.2 Resin Development
  - 10.2 Sinopec Shanghai Petrochemical Co., Ltd
    - 10.2.1 Company Profile
    - 10.2.2 Resin Development
  - 10.3 Sinopec Maoming Petrochemical Co., Ltd
    - 10.3.1 Company Profile
    - 10.3.2 Resin Development
  - 10.4 Sinopec Yangzi Petrochemical Co., Ltd
    - 10.4.1 Company Profile
    - 10.4.2 Resin Development
  - 10.5 Blue Star New Chemical Materials Co., Ltd
    - 10.5.1 Company Profile
    - 10.5.2 Operation
    - 10.5.3 Resin Development
  - 10.6 PetroChina Lanzhou Petrochemical Company
    - 10.6.1 Company Profile
    - 10.6.2 Resin Development
  - 10.7 PetroChina Jilin Petrochemical Company
    - 10.7.1 Company Profile
    - 10.7.2 Resin Development
  - 10.8 PetroChina Dushanzi Petrochemical Company
    - 10.8.1 Company Profile
    - 10.8.2 Resin Development

# Selected Charts

- Application Fields of Top Five Synthetic Resins
- Apparent Consumption of World's Top Five Synthetic Resins, 2008-2009
- Forecast of Global Demand for Top Five Synthetic Resins, 2010
- World's Top Five Synthetic Resins Demand and Ratio by Region, 2010
- Asia's PE and PP Demand and Ratio to the World, 2010
- North America's PE and PP Demand and Ratio to the World, 2010
- Western Europe's PE and PP Demand and Ratio to the World, 2010
- Output of Top Five Synthetic Resins in China, 2009
- Apparent Consumption of Top Five Synthetic Resins in China, 2009
- Synthetic Resin Consumption in Downstream Sectors, 2009-2010
- China's Import & Export Volume of Top Five Synthetic Resins, 2009
- China's PE Import Origins, 2009
- China's PP Import Origins, 2009
- Capacity Ratio of PE Equipment by Type in Asia-Pacific, 2009 & 2015
- World's PE Consumption Ratio by Region/Country, 2008
- China's PE Manufacturers and Capacity, 2009
- Capacities and Time to Put into Production of Major Newly-built PE Equipments, 2010
- China's PE Output, 2006-2010
- China's PE Import & Export Volume, 2008-2010
- Apparent Consumption of PE Resin in China, 2008-2010
- LDPE/LLDPE Consumption Structure, 2010
- HDPE Consumption Structure, 2010
- China's PE Apparent Consumption, 2008-2010

- LDPE (Injection Molding Level) Tax-inclusive Price, 2008-2010
- China's PVC Capacity, 2005-2012
- China's PVC Capacity by Province/Municipality, 2008
- China's PVC Output, 2006-2010
- China's PVC Operating Rate, 2006-2009
- China's PVC Apparent Consumption, 2007-2010
- China's PVC Import & Export Volume, 2007-2010
- PVC (WS-800S) Price, 2008-2010
- China's PP Capacity, 2008-2009
- Capacity and Percentages of PP Manufacturing Groups in China, 2009
- China's Large and Medium-sized PP Equipment and Capacity, 2009
- PP Equipment and Capacity Put into Production and Under Construction, 2010
- China's PP Output, 2006-2010
- China's PP Import & Export Volume, 2008-2010
- Average Unit Price of China's PP Import, 2006-2010
- China's PP Import Value, 2006-2010
- China's PP Apparent Consumption, 2008-2010
- China's PP Consumption Structure, 2008
- China's PP Tax-inclusive Price, 2005-2010
- China's PS Apparent Consumption, 2005-2009
- China's PS Import & Export Volume, 2007-2010
- China's PS Import & Export Value, 2007-2010
- China's HIPS Tax-inclusive Price, 2008-2010
- China's ABS Resin Capacity, 2005-2009
- China's ABS Resin Manufacturers and Capacities, 2009
- China's Newly-built ABS Resin Projects and Time to Put into Production, 2010



- China's ABS Output, 2005-2009
- China's ABS Import & Export Volume, 2000-2009
- China's ABS Apparent Consumption Volume, 2005-2009
- China's ABS Consumption Structure, 2008
- China's ABS Supply and Demand Balance, 2000-2009
- ABS Resin (Injection Molding Level) Tax-inclusive Price, 2007-2010
- China's UPR Output, 2008-2009
- Polycarbonate Demand and Forecast
- Products and Competitiveness of World's Major Resin Manufacturers
- Resin Related Divisions and Products of Dow Chemical
- Market Positions of Dow Chemical Resin Related Products
- Net Sales of Dow Chemical, 2007-2010
- Revenue of Dow Chemical by Sector, 2009 & Q3 2010
- Business Centers and Production Bases of Dow Chemical China
- BASF Resin Related Divisions and Major Products
- BASF Sales and Net Income, 2008-2010
- BASF Financial Statement of Plastic Division, 2009 & Q3 2010
- BASF Financial Statement of Functional Product Division, 2009 & Q3 2010
- Major Production Bases and Products of BASF China
- Main Business of Exxon Mobil
- Exxon Mobil Market Shares of Major Petrochemical Products, 2009
- Major Resin Products of Exxon Mobil
- Total Revenue and Net Income of Exxon Mobil, 2006-2010
- Product Profit and Sales Volume of Exxon Mobil, 2006-2010
- Production Bases and R&D Centers of Exxon Mobil in China
- Major Resin Products of Bayer Material Science Division

- Bayer Material Science's Income by Sector and Region, 2008-2009
- Bayer Material Science's Quarterly Income by Sector and Region, 2009-2010
- Profile of DuPont, 2009
- Seven Business Segments of DuPont, 2010
- Resin and Other Products of DuPont Functional Materials Division, 2009
- Pre-tax Operating Income (PTOI) and Profit of DuPont Functional Materials Division, 2007-2010
- DuPont's Major Resin Manufacturers and Products in China
- Key Chinese Resin Manufacturers and Main Resin Products and Competitiveness Positions
- Capacity of Resin and Other Products of Sinopec Qilu Petrochemical, 2009
- Capacity of Major Petrochemical Products of Sinopec Shanghai Petrochemical, 2009
- Net Sales and Operating Profit of Resin and Plastics Business of Sinopec Shanghai Petrochemical, 2007-2009
- Sales of Resin and Plastic Products of Sinopec Shanghai Petrochemical, 2007-2009
- Major Products of Sinopec Maoming Petrochemical
- Sales Revenue and Profit of Sinopec Maoming Petrochemical, 2009
- Capacity of Major Resins of Sinopec Yangzi Petrochemical, 2009
- Operating Income of Sinopec Yangzi Petrochemical, 2007-2008
- Operating Income of Blue Star New Chemical Materials, 2007-2010
- Operating Income and Operating Margin by Product of Blue Star New Chemical Materials, 2009
- Operating Income of PetroChina Lanzhou Petrochemical, 2007-2008
- Capacity of Major Resin Products of PetroChina Lanzhou Petrochemical, 2009
- Operating Income of PetroChina Lanzhou Petrochemical, 2007-2008
- Capacity and Newly-built Capacity of Major Resin Products of PetroChina Jilin Petrochemical, 2009
- PE and PP Capacity of PetroChina Dushanzi Petrochemical, 2009

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