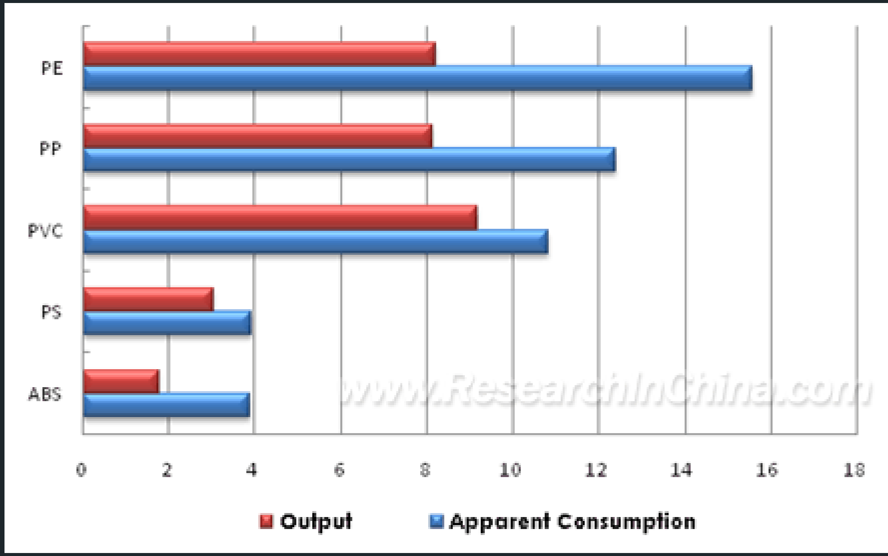
China Resin Industry Report, 2009-2010

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

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