Global and China 1,4-Butanediol (BDO) Industry Report, 2010-2011

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This report

- **Analyzes the status quo and development of the golbal and China's 1,4-butanediol (BDO) industry,such as supply and demand, competition pattern, as well as price tendency.**
- **Focuses on the development of BDO downstream industries.**
- **Highlights the current development, operation and prospect of key BDO manufacturers across China and beyond.**

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Abstract

1, 4-butanediol (BDO) is an important raw material for basic organic chemicals and fine chemicals. Subject to the financial crisis, the global BDO capacity has showed sluggish growth, up merely 3.7% year on year in 2010. Due to high technology thresholds and limited raw material sources, the BDO production Is highly concentrated. The world's major BDO manufacturers include Germany's BASF, Taiwan's Dairen, America's Lyondell and ISP, China's Shanxi Sanwei Group, with BDO capacity of 520 thousand tons, 256 thousand tons, 188 thousand tons, 153 thousand tons and 150 thousand tons respectively in 2010, accounting for nearly 60% of the world's total.

On the basis of analyzing the supply & demand, competition pattern and development of global BDO industry, this report lays emphasis on the research of current development, supply & demand, competition pattern and development of downstream industries of Chinese BDO industry.

China's BDO industry has grown up based on the introduction of advanced technologies from overseas. In 2010, China's BDO capacity increased 20.2% year on year. In terms of capacity, Shanxi Sanwei Group, accounting for 150 thousand tons (33.6%) of the total capacity in China in 2010, was the largest manufacturer of BDO in China. Xinjiang Markor and Nanjing Bluestar ranked second and third. Enterprises in Chinese Mainland, except Dairen Chemical (Jiangsu) Co., Ltd., generally adopt the Reppe method and maleic anhydride method in BDO production. With the restriction on high energy consumption industries and implementation of energy-saving and emission reduction policies in China, in the future, the percentage of BDO facilities adopting Reppe method will decrease, whereas maleic anhydride method will be increasingly adopted thanks to its advantages including small investment, high quality of products, low emission, capability of co-production of THF and GBL and controllable product ratio.

Key BDO Manufacturers and Capacities in China, 2010

Manufacturer	Annual Capacity (10,000 tons)	Technology
Shanxi Sanwei Group Co., Ltd.	15	75 thousand tons by Acetylene Reppe Method; 75 thousand tons by Maleic Anhydride Method
Xinjiang Markor	6.0	Natural Gas Acetylene Method
Bluestar New Chemical Materials Co., Ltd., Nanjing Company	5.5	Maleic Anhydride Method
Dairen Chemical (Jiangsu) Corp.	3.6	Allyl Alcohol Method
Shandong Dongying Shengli Zhongya Chemical Co., Ltd.	3.5	Maleic Anhydride Method
Shaanxi Bidi' ou Chemical Co., Ltd.	3.0	Acetylene Reppe Method
Fujian Meizhouwan Chlor-Alkali Chemical Industry Co., Ltd.	3.0	Acetylene Reppe Method
Yunnan Yunwei Group Co., Ltd.	2.5	Acetylene Reppe Method
Sichuan Tianhua Fubang Chemical Industry Co., Ltd.	2.5	Natural Gas Acetylene Method
Total	44.6	-

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With regard to the demand, driven by the fast development of downstream spandex and PBT industries, the annual average compound growth rate of BDO consumption in China reached 21.9% in 2006-2010. In 2010, the demand for BDO in China totaled 366 thousand tons, up 18.1% year-on-year. In terms of the consumption structure of BDO, THF/PTMEG is the largest consumption market, followed by PBT.

This report not only analyses the status quo, supply and demand, competition pattern, price tendency, development of BDO industry as well as the development trends of downstream industries concerned, but also introduces in detail the current development, operation and prospect of key BDO manufacturers across China and beyond.

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