



# China Surfactant Industry Report, 2011-2013

Dec. 2011

## STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, import & export, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

### Report Objectives

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and understand the size and growth rate of any opportunity.

## METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study.

Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

## INFORMATION SOURCES

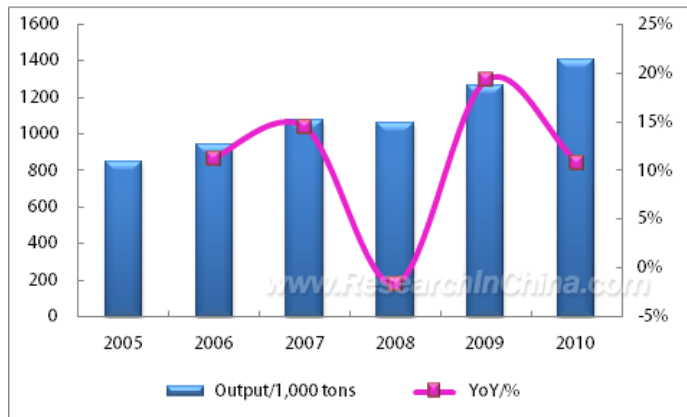
The primary information sources include NBS(National Bureau of Statistics of China)、China Customs, Wind and so on.

## Abstract

Surfactant is mainly applied in the fields of detergent products, cosmetics, food processing and textile printing and dyeing.

In recent years, along with the steady growth of surfactant output in China, product mix of surfactant has been optimized. However, some of high-end varieties with special functions still rely on import. With a CAGR of 10.6% during 2005-2010, the output of surfactant registered 1.402 million tons in 2010, a 10.8% YoY rise. Meanwhile, its apparent consumption and import volume hit about 1.489 million tons and 311,000 tons respectively, with import dependency of 20.9%.

### Output and Growth Rate of Surfactant in China, 2006-2010



Source: ResearchInChina

During the 12th Five-Year Plan (2011-2015), Chinese surfactant industry will focus on structural upgrading, which will reduce the high import dependence of high-end surfactant products. It is expected that surfactant output and apparent consumption will achieve 1.861 million tons and 1.933 million tons respectively, with the supply and demand gap down to around 70,000 tons.

Surfactant can be classified into natural oil-based surfactant and petroleum-based surfactant, according to different raw materials. In recent years, petroleum-based surfactants represented by LAS have been gradually replaced by natural oil-based surfactants such as AES, AEO and MES, due to the price rise of petroleum, poor degradability and low safety. In China, output proportion of LAS in the total output dropped from 35.8% in 2005 to 29.8% in 2010, while that of AES increased from 18.0% to 22.5%.

As a new generation of green surfactant with the greatest development potential, MES features low price, high efficiency and environmental friendliness. Currently, MES industry is still in its infancy in China, with annual output no more than 10,000 tons. Output of MES will maintain the growth rate over 20% in China in the next few years, along with the accelerated industrialization.

In 2010, the top 5 surfactant manufacturers by production scale in China included Zhejiang Zanyu Technology Co., Ltd., Sinolight Chemicals Co., Ltd., Hunan Resun Industrial Co., Ltd., Nanjing Jiahe Daily Chemical Co., Ltd. and Sasol (China) Chemical Co., Ltd, of which the total sales volume amounted to 394,000 tons. Zhejiang Zanyu Technology Co., Ltd is the largest AES surfactant producer in China.

Currently, it owns the capacity of MES 30,000 t/a, and its 30,000 t/a MES capacity in the 2nd-stage project started construction in September 2011 and is expected to put into production in September 2012.

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