Global and China Epoxy Resin Industry Chain Report, 2011-2012

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STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, 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

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 Custom and China Epoxy Resin Industry Association etc.

Abstract

Epoxy resin is a polymeric compound containing two or more epoxy groups and mainly finds application in coatings, electrical systems and electronics, and composite materials which together consume around 80% of the global epoxy resin.

In 2011, the global epoxy resin output approximated 2.24 million tons (80%-95% of which were Bisphenol A Epoxy Resin) and was mainly distributed in Asia, Western Europe and the United States where their output totally made up over 90% of the global total. Among these origins, China is the world's largest producer and delivers about 37.1% of the global total output. As the European and American markets grow saturated, the increase of epoxy resin production is principally contributed by Asian countries especially China. In 2005 2011, the CAGR of epoxy resin output in China hit 10.8%, while that in Euro-American regions was only 3% or so.

Chinese epoxy resin manufacturers started late and few of them possess absolute scale advantages, featuring lower industry concentration degree than Euro-American nations. In 2011, the top 10 epoxy resin producers in Mainland China accounted for 60% of the national total capacity, while the capacity of the world's top 6 epoxy resin manufacturers made up 61.8% of the global total. In this year, the top 3 epoxy resin manufacturers by capacity in Mainland China included Nan Ya Epoxy Resin (Kunshan) Co., Ltd., Sanmu Group and Kingboard Chemical Holdings Ltd.

Nan Ya Epoxy Resin (Kunshan) Co., Ltd. is the epoxy resin production base of Taiwan-based Nan Ya Plastics Corporation. As the Phase-II boasting annual capacity of 186.3 kt epoxy resins was put into production, the company's epoxy resin capacity amounted to 316 kt/a in 2011, occupying 17.6% of the total capacity in Chinese Mainland, and Nan Ya Plastic Corporation thus becomes the world's largest producer of epoxy resin and enjoys capacity of 480 kt/a. Sanmu Group ranked No. 5 in the world in 2011 by virtue of 200 kt/a epoxy resin and now has a 70 kt/a epoxy resin project under construction which will be put into operation in 2012.

Most epoxy resins are produced from a reaction between epichlorohydrin and bisphenol-A which boasted output of 450,000 tons and 400,000 tons respectively in Mainland China in 2011, with self-sufficiency rates of 99.1% and 41.0% separately.

The epichlorohydrin market in Chinese Mainland is dominated by domestic manufacturers. In 2011, the top 3 companies by capacity were Shandong Haili Chemical Industry Co., Ltd., Shandong Wudi Xinyue Chemical Co., Ltd. and Tianjin Botian Chemical Co., Ltd., of which Shandong Haili Chemical Industry maintained No. 1 in Asia and No. 2 in the world for its epichlorohydrin capacity.

The market demand for bisphenol A is largely dependent on imports. In 2011, the top 3 bisphenol A manufacturers by capacity in Mainland China included Bayer (Shanghai) Polymer Co., Ltd., Sinopec Mitsubishi Chemical Polycarbonate (Beijing) Co., Ltd. and Shanghai Sinopec Mitsui Chemicals Co., Ltd.

It is in the report that covers the followings:

- The market size, competition pattern, consumption structure and regional distribution of the global epoxy resin industry;
- The supply & demand, competitive landscape, import & export, price trend and projects to be built/under construction of Chinese epoxy resin industry;
- The supply & demand, competition pattern, import & export, price trend and projects to be built/under construction of the upstream epichlorohydrin market;
- The supply & demand, competition structure, import & export, price trend and projects to be built/under construction of the upstream bisphenol A market;
- The demand structure and development forecast of epoxy resin in the downstream coatings, electrical systems and electronics, and composite materials;
- The operation, production and marketing, suppliers, customers and capacity of 15 epoxy resin manufacturers at home and abroad.

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