



**China Polyether Monomer
(MPEG/APEG/TPEG) Industry Report,
2011-2012**

Sept. 2012

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

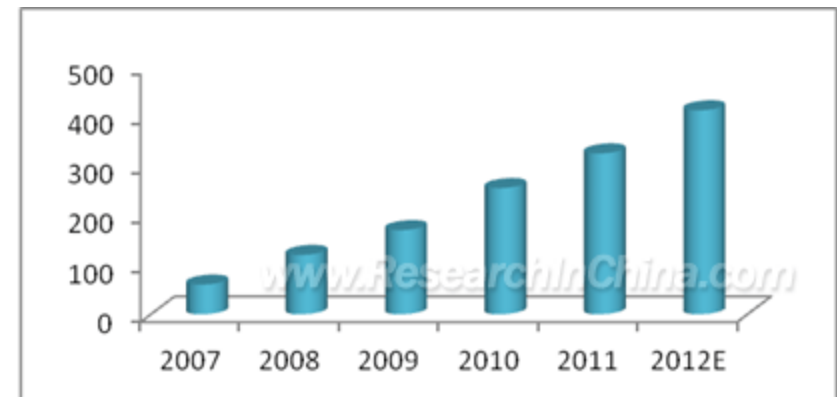
The primary information sources include China Concrete Admixture Association, WIND Database etc.

Abstract

Polyether monomer is produced through the polymerization of ethylene oxide (EO) and other monomers and mainly falls into three categories in China: MPEG, APEG and TPEG. Along with the improvement of R&D capabilities and advancement in production technologies, polyether monomer has found extensive application in diverse fields such as construction industry, daily chemicals and pharmaceutical manufacturing.

The polycarboxylate water reducer for construction industry serves as the most important home market for polyether monomer. In 2011, the demand for polyether monomer from polycarboxylate water reducer approximated 300,000 tons. Although the development of high-speed rail and real estate sectors has slowed down in recent two years, a great number of concrete projects in water conservancy, highway, bridge, rail transportation and airport construction are still steadily carried forward, and the State introduces relevant policies to support the development of polycarboxylate water reducer. Therefore, the market capacity of polycarboxylate water reducer (solid content of 20%) is expected to reach 4.65-6.10 million tons by 2015, when the demand for polyether monomer will surpass 600,000 tons.

Consumption of Polyether Monomer for Water Reducer in China, 2007-2012 (kt)



Source: ResearchInChina
<China Polyether Monomer (MPEG/APEG/TPEG) Industry Report, 2011-2012>

Liaoning Oxiranchem, Inc., Liaoning Kelong Fine Chemical Co., Ltd., Zhejiang Huangma Chemical Industry Group Co., Ltd. and Shanghai Taijie Chemical Co., Ltd. are the main providers of polyether monomer in China, of which Oxiranchem has been the industry leader in recent years and holds 25%-28% market share (polycarboxylate water reducer field).

Fueled by the robust demand from downstream sectors and its capacity expansion, the revenue of Oxiranchem attained a CAGR of 100.3% in 2009-2011. In H12012, the company saw its revenue from polyether monomer business hit RMB711 million and sales volume grow 15.7% YoY to nearly 60,000 tons. As of H1 2012, Oxiranchem had had several polyether monomer projects (annual capacity totalizing over 400,000 tons) under construction, so it is evident that the company will continue to give priority to polyether monomer.

However, due to restrictions in technologies and key raw materials (such as allyl alcohol), China will still have to import polyether monomer from Honam, Clariant and Dow, etc. to meet the domestic demand, particularly the demand from high-end application market.

The report mainly highlights the followings:

- Status quo, market supply and demand, competition pattern, development forecast and otherwise of Chinese polyether monomer industry;
- Influence on the development of Chinese polyether monomer market exerted by changes in supply & demand and prices of upstream raw materials such as EO, methanol, allyl alcohol and acrylic acid, etc.;
- Influence of downstream sectors like polycarboxylate water reducer, daily chemicals and pharmaceutical manufacturing on the development of Chinese polyether monomer market;
- Operation, polyether monomer business, development prospects and so forth of 3 foreign and 8 domestic companies.

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