Global and China Acrylic Acid and Esters Industry Report, 2012-2015

Nov. 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 Wind Information, and Company Reports etc.

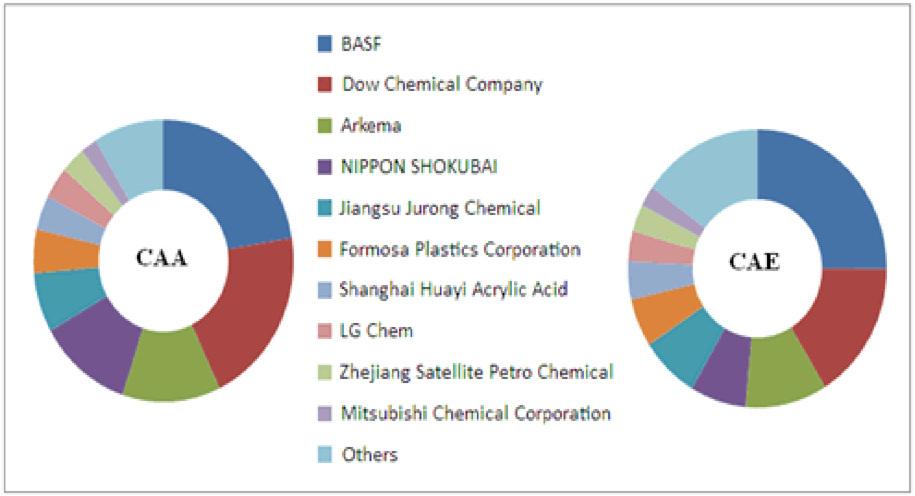
Abstract

Acrylic acid & esters is the general term for acrylic acid (AA) and acrylic esters (AE). In 2007-2011, global capacity of both crude acrylic acid (CAA) and common acrylic esters (CAE), inclusive of methyl acrylate (MA), ethyl acrylate (EA), butyl acrylate (BA)，ethyl hexyl acrylate (EHA),etc., presented an upward trend, with compound growth rates of 2.03% and 3.39%, respectively.

As of end-2011, global capacity of CAA and CAE reached 5.32 million t/a and 4.776 million t/a, mainly distributed in the United States, Europe, Japan and China, which accounted for a total of 88.42% and 81.4%, respectively. In 2011, the global acrylic acid consumption amounted to 5.21 million tons, of which, that used for producing super absorbent polymer (SAP), paints & coatings, adhesives occupied 63%.

The acrylic acid & esters industry characterizes a relatively high concentration. In 2011, CAA and CAE capacity of the world's top ten producers, i.e. BASF SE, Dow Chemical Company, Arkema, NIPPON SHOKUBAI, Jiangsu Jurong Chemical Co., Ltd., Formosa Plastics Corporation, Shanghai Huayi Acrylic Acid Co., Ltd., LG Chem, Zhejiang Satellite Petro Chemical Co. Ltd. and Mitsubishi Chemical Corporation held a global share of 91.4% and 84.8%, separately, of which, Jiangsu Jurong Chemical (foreign-controlled), Shanghai Huayi Acrylic Acid and Zhejiang Satellite Petro Chemical are located in the territory of China. Also in 2011, Jiangsu Jurong Chemical, relying on the production capacity of 365,000 t/a CAA and 350,000 t/a CAE, ranked first among Chinese acrylic acid & esters manufacturers, followed by Shanghai Huayi Acrylic Acid.

Capacity Structure of Global Acrylic Acid & Esters by Top 10 Manufacturers, 2011



Source: ResearchInChina *Global and China Acrylic Acid and Esters Industry Report, 2012-2015*

In China, the acrylic acid & esters industry has seen rapid development in recent years, with basic self-sufficiency, but accompanied by fierce competition among manufacturers. From 2007 to 2011, CAA production rose from 697,000 tons to 1.165 million tons, with a CAGR of 13.7%; CAE production climbed from 732,000 tons to 1.163 million tons, with a CAGR of 12.3%. Furthermore, major producers have been continuously expanding their capacity.

BASF, the world's largest acrylic acid & esters manufacturer, has reached the level of 160,000 tons/a CAA and 155,000 tons/a CAE via the joint venture construction of BASF-YPC Company Limited with Sinopec Group. In January 2012, BASF announced the establishment of a new set of 190,000 tons/a fine acrylic acid device in the Nanjing Chemical Industry Park, so as to further increase its market share in China.

Listed in 2011, Zhejiang Satellite Petro Chemical has raised funds for the expansion of Acrylic Acid & Esters Phase III Project, with new capacity of 60,000 tons/a acrylic acid and 20,000 tons/a esters; meanwhile, it has perfected the downstream industry chain 30,000 tons/a SAP Technological Transformation Project, which is expected to be put into production in mid-2013. At the end of 2012, SunVic Chemical Holdings Limited's 320,000 tons/a acrylic acid plant in Taizhou will go into operation; in the meantime, the company's another one million tons/a catalytic cracking plant in Taizhou is primarily involved in the production of the main raw material propylene, to improve the upstream chain of acrylic acid & esters industry.

Global and China Acrylic Acid & Esters Industry Report, 2012-2015 of ReserachInChina, mainly covers the followings:

Supply & demand, competitive landscape, geographical distribution, development tendency, etc. of global acrylic acid & esters industry;
Supply & demand, imports & exports, competition pattern, development trend, etc. of Chinese acrylic acid & esters industry;
Market supply and demand, competitive landscape, development tendency, etc. of upstream / downstream acrylic acid & esters industry in China;
Operation, AA & AE business, development prospect of 12 global and Chinese manufacturers.

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