



Global and China Biodegradable Plastics Industry Report, 2012-2015

Apr. 2013

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 Customs, and National Bureau of Statistics of China etc.

Abstract

Under the influence of environmental pollution, severe waste of resources and other factors, biodegradable plastics industry has been a great concern over recent years. Global biodegradable plastics capacity in 2012 exceeded one million tons. However, affected by product performance, exorbitant prices, etc., the actual demand for biodegradable plastics around the world is only 760 kt or so, less than 1% of the overall plastics market demand, revealing a huge market space for biodegradable plastics industry.

Currently, starch-based plastics, polylactic acid (PLA) and polybutylene succinate (PBS) plastics as the world's three major types of biodegradable plastics occupy about 90% of the total capacity. The first developed starch-based biodegradable plastics has the most mature technology, accounting for approximately 41% of the world's total biodegradable plastics capacity, but inferior to PLA, PBS, PHA and other varieties in performance. Following the advances in technology research and development, PLA, PBS, etc. will usher in a gradually swelling market; it is expected that by 2015 PLA and PBS products will account for a total of 55% of the global biodegradable plastics capacity.

China's biodegradable plastics industry development under the stimulus of many favorable factors, is also beginning to take shape. In 2012, there have been about a dozen manufacturers with total capacity up to 301 kt/a, accompanied by a CAGR of 27.3% in 2009-2012.

Kingfa Technology Inc., Wuhan Huali Environmental Technology Co., Ltd., Shenzhen Esun Industrial Co., Ltd., etc. have realized 10 kt/a-scale biodegradable plastics production, covering PBS series, starch-based biodegradable plastics and PLA series.

According to information publicized by companies, the production of Chinese biodegradable plastics is expected to hit 650 kt/a by 2015. Among them, the newly-built 10 kt/a PBS Project of Youth Chemical Co., Ltd., a subsidiary of Jiangsu Yangnong Chemical Group, started construction in 2011, expected to be completed and commissioned in 2013; In September 2012, Zibo Qixiang Tengda Chemical Co., Ltd raised funds for new 150 kt/a PBS devices and raw materials related devices through non-public offering of stock, with a total construction period of 2.5 years.

Global and China Biodegradable Plastics Industry Report, 2012-2015 of ResearchInChina mainly covers the followings:

- Supply & demand, product structure, regional structure, competition pattern, development trends, etc. of global biodegradable plastics industry;
- Supply & demand, competition pattern, development trends, etc. of China biodegradable plastics industry;
- Development status, competition pattern, etc. of PSM, PLA, PHA, PBS and other biodegradable plastics sectors;
- Operation, biodegradable plastics business analysis and development of 10 Chinese and foreign companies.

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