



Global and China High Barrier Material Industry Report, 2013-2016

June 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 Company Reports, and National Bureau of Statistics of China etc.

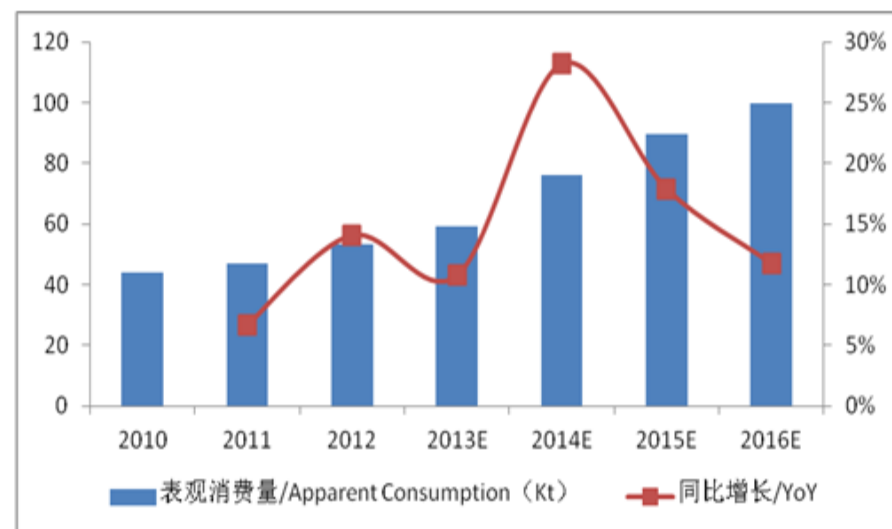
Abstract

Polyvinylidene Chloride (PVDC), Ethylene / Vinyl Alcohol Copolymer (EVOH), Polyethylene Naphthalate (PEN) are three well-known high barrier materials in the market. Featured with strong gas barrier property, organic solvent resistance, environmental protection and safety, these materials are widely used in food, drug packaging and other fields.

By 2012, the global PVDC resin capacity had been 214Kt, mainly contributed by Dow Chemical, Kureha, Asahi Kasei and other companies. Meanwhile, major Chinese PVDC resin producers included Juhua (capacity: 28 Kt/a) and Nantong Hui Yu Feng New Materials (a joint venture of Shuanghui, Kureha and Toyota Tsusho) (capacity: 10 Kt/a). In 2013, Juhua will expand the PVDC resin capacity to 34Kt/a, while in 2014, Nantong Hui Yu Feng New Materials will raise the PVDC resin capacity to 20Kt/a.

In China, PVDC resin is usually applied to the production of PVDC casing film. As of 2012, China's PVDC casing film capacity hit 80Kt/a, of which 35Kt/a (44%) came from Shuanghui and 12Kt/a (15%) was generated by Shandong Jinluo. Furthermore, China is developing PVDC plastic wrap and PVDC shrink film. In August 2012, Juhua developed PVDC plastic wrap resin independently.

China's Apparent Consumption of PVDC Resin, 2010-2016E



Source: ResearchInChina Global and China High Barrier Material Industry Report, 2013-2016

In 2012, the global EVOH resin capacity reached 132Kt, mostly released by Kuraray, Nippon Gohsei and Taiwan ChangChun PetroChemical. China relies on the import of EVOH resin. In the future, in the wake of China's EVOH resin industrialization, the upgrading of food packaging and the fast-growing automotive industry, the demand for EVOH resin will ascend stably.

By 2012, Teijin, Toyobo and Mitsubishi Chemical had the ability of producing PEN. China is conducting the R & D of PEN products, and no one company can enforce mass production.

The report mainly covers the following aspects:

Overview of high barrier materials, containing definition, classification, industry chain and prospect;

Global and Chinese PVDC, EVOH and PEN markets, embracing definition, classification, production process, processing technology, capacity, output, sales volume, supply, demand, application and future development trends.

14 global and Chinese PVDC, EVOH and PEN enterprises, including PVDC producers Dow and Kureha, EVOH companies Kuraray and Nippon Gohsei, as well as PEN vendors Teijin and DuPont. The report introduces their profile, revenue, revenue structure, R & D investment, PVDC, EVOH and PEN business, business in China and prospect.

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- 1.1 Definition
- 1.2 Classification
- 1.3 Industry Chain
- 1.4 Prospect

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 - 2.1.1 Definition
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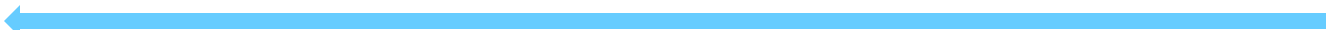
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