Global and China Chlor-alkali Industry Report, 2013

Aug. 2013

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

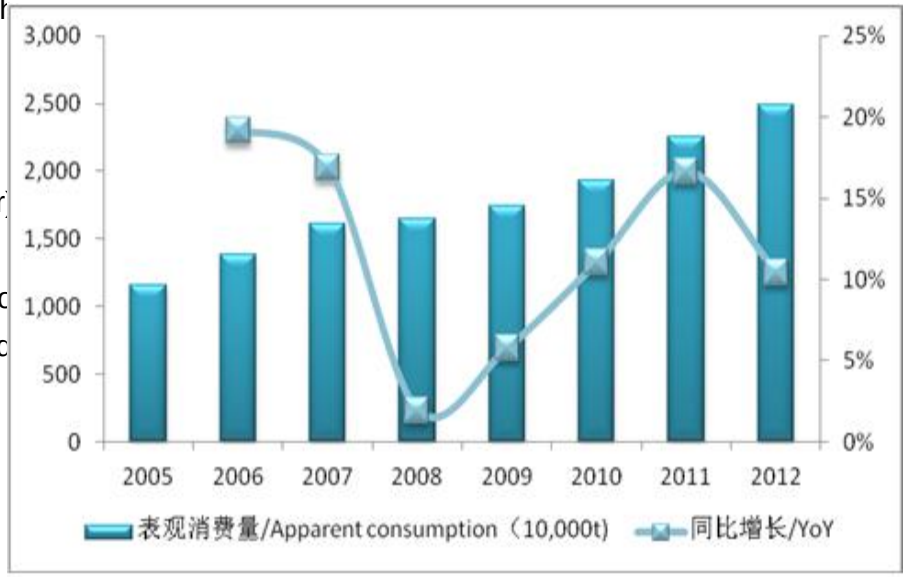
Abstract

The industry producing chemicals with sodium hydroxide (caustic soda), chlorine and hydrogen made through the electrolysis of crude salt solution is known as the chlor-alkali industry, involving more than 200 product varieties including caustic soda (NaOH), polyvinyl chloride (PVC), hydrochloric acid, liquid chlorine, hydrogen, methane chloride and epichlorohydrin, among which caustic soda and PVC are the most important ones.

In 2012, China's caustic soda production capacity was 37.36 million tons (up 9.5% year on year), the output was 26.99 million tons (up 9.42% year on year) and the capacity utilization was 72.2%. Caustic soda enterprises are mainly concentrated in North China, East China and Northwest China. In 2012, the top five provinces by output were Shandong, Jiangsu, Henan, Inner Mongolia and Zhejiang, accounting for 21.69%, 15.36%, 6.24%, 6.06% and 5.20% of total caustic soda output respectively.

Since mid-August 2010, China's increasing power limitation, production restriction, energy conservation and emission reduction policies, high crude sa prices and stable downstream demand have directly promoted the prices of caustic soda. In July-August 2012, the price of caustic soda was up to RMB 960 / ton, an increase of RMB 260 / ton compared with RMB 700 / ton in January-March 2011.

Apparent Consumption and YoY Growth Rate of Caustic Soda in China, 2005-2012



Source: ResearchInChina *Global and China Chlor-alkali Industry Report, 2013*

In 2012, China's PVC production capacity was 23.41 million tons (an increase of 8.23% year on year, accounting for 44.4% of the global total), and the output was 13.18 million tons (up 1.74% year on year). China's PVC capacity utilization declined from 71.1% to 51.4% in 2006-2009, and then picked up in 2010-2011, but declined by 3.6 percentage points year on year to 56.3% in 2012, and remained below 70% in the year, with an evident trend of overcapacity.

An overview of the chlor-alkali industry shows that the production center is obviously transferring towards the central and western regions, and the capacity of enterprises in the central and eastern regions without resource advantages will gradually shrink. In the future, in the resource-rich western region, large conglomerates with raw material, cost, technology, capital and management advantages as well as integrated industrial chains will hold advantageous and controlling positions in the competition.

This report analyzes the global and Chinese chlor-alkali industry and market, introduces the market conditions of main chlor-alkali products (caustic soda, PVC), and other chlor-alkali products (liquid chlorine, hydrochloric acid, methane chloride, propylene oxide, TDI, MDI). It includes:

1. Development overview of global chlor-alkali industry (including caustic soda and PVC capacity, output, import & export volume, apparent consumption by country);
2. Development overview of Chinese chlor-alkali industry (including development status, industry characteristics, authorities, relevant policies, development bottleneck, trends);
3. Chinese caustic soda and PVC industries (including production capacity, output, import & export, apparent consumption, price trends, regional markets, competition pattern);
4. Upstream and downstream product markets of caustic soda and PVC in China (including upstream products such as electricity, crude salt, calcium carbide, ethylene, and downstream industries like alumina, paper pulp, chemical fiber, plastic products);
5. The operation, revenue structure, gross margin, output and sales volume of chlor-alkali products, cost structure, top five customers, and competitive advantages of ten major companies in Chinese chlor-alkali industry.

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