



**Global and China 1,4-Butanediol (BDO)
Industry Report, 2012-2015**

Aug. 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.

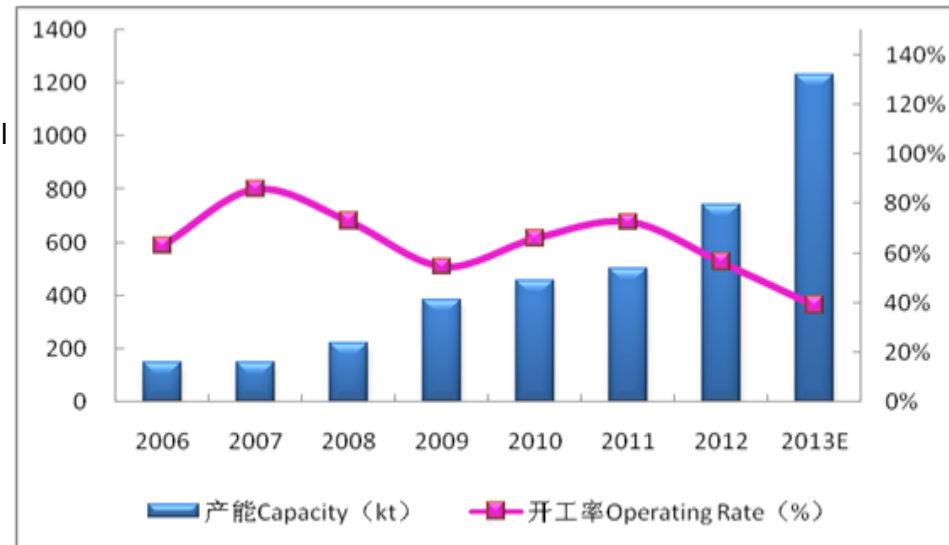
Abstract

As an important organic and fine chemical, 1,4 - butanediol (BDO) is widely used in pharmaceutical, chemical, textile and household chemical fields.

Thanks to high technical barriers and limited sources of raw materials, the global BDO production is relatively concentrated. In 2012, the global BDO capacity was mainly distributed in Asia which contributed 60% or more to the global capacity, the United States and Europe. The combined BDO capacity of the world's five largest manufacturers, namely Germany BASF, Taiwan Dairen Chemical Corporation, LyondellBasell, ISP and Shanxi Sanwei, made up over 50% of the global total capacity in 2012.

In recent years, many companies have implemented new or expansion plans in response to the growing demand for BDO downstream products such as poly-tetrahydrofuran (PTMEG), polybutyleneterephthalate (PBT) and γ -butyrolactone, so that China's BDO production scale has bulged. In 2012, China's BDO capacity reached 744,000 tons, while the demand just hit about 490,000 tons, and the operating rate of plants was less than 60%.

China's BDO Capacity and Operating Rate, 2006-2013



Source: ResearchInChina Global and China 1,4-Butanediol (BDO) Industry Report, 2012-2015

In the next few years, China's new BDO capacity will be still considerable. According to the published proposed / ongoing construction plans, China's new BDO capacity will reach 1.70 million tons or so in 2013 - 2015. If this is realized as scheduled, China's BDO production will see excessive overcapacity and the market competition will prick up further, which will lead to the suspension and shutdown of some production devices.

China BDO industry characterizes high concentration. As of the end of July 2013, top three BDO producers had contributed 42.8% to the total capacity in Mainland China together. Markor Chem is China's largest BDO enterprise with the capacity of 160,000 tons /a including 100,000 tons /a realized in March, 2013. The ranking No.2 Shanxi Sanwei is China's only BDO manufacturer that has independent intellectual property rights of Reppe process with 75,000 tons / a Reppe-process and 75,000 tons / a maleic anhydride-process BDO facilities. Nanjing Bluestar takes the third position with two sets of 55,000 tons / a maleic anhydride-process BDO production equipment.

Global and China 1,4-Butanediol (BDO) Industry Report, 2012-2015 mainly covers the followings:

Regional distribution of capacity, supply and demand, competition patterns of the global BDO industry;

Policies, supply and demand, competition patterns, import and export, price trend, proposed / ongoing construction projects, development outlook of China BDO industry;

Supply and demand, competition patterns, import and export, price trend, proposed / ongoing construction projects of the global and China PTMEG industry;

Supply and demand, import and export, price trend of the global and China PBT / GBL industry;

Operation and BDO business of 13 BDO producers in the world and China as well as the BDO projects of 13 Chinese companies.

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