China Ethylene Oxide Industry Report, 2012-2020

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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

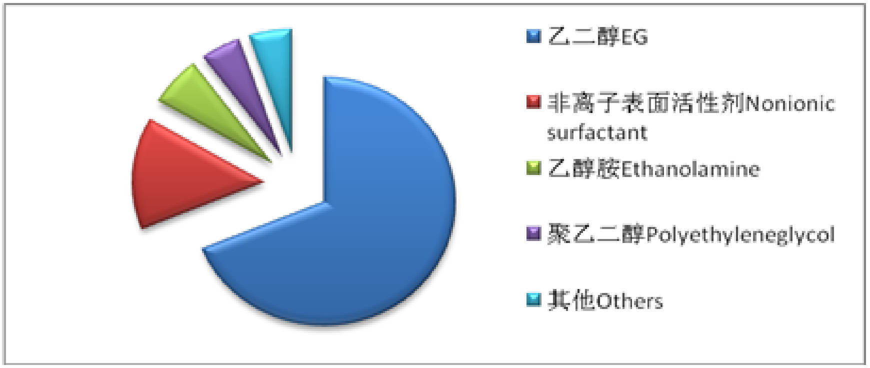
As a key organic chemical raw material only next to polyethylene and PVC among the derivatives of ethylene industry, ethylene oxide (EO) is widely applied in the manufacturing of ethylene glycol, nonionic surfactant, polycarboxylate water reducer, crystalline silicon cutting fluid, ethanol amine, etc..

In 2012, the EO capacity around the globe was mainly distributed at Asia-Pacific, North America and Middle East, with proportion exceeding 80%. China is one of the major producing areas of EO, and the EO capacity totaled 5 million tons approximately as of August 2013, sharing 17% or so of world's total capacity. The capacity distribution is characterized by obvious regional features, with around 60% capacity distributed in Eastern China, which is consistent with the distribution of ethylene (main raw material).

Along with the growth of EO capacity in China, the output also witnesses continuous improvement, and climbed up to 3.7 million tons or so in 2012. According to the proposed/ongoing projects, the newly added capacity of EO in China will reach 3.5-4 million tons during 2013-2015. The growing capacity will make the EO industry encounter the risk of overcapacity in short term, and it is predicted that the integral operating rate of the industry will decline to less than 80%.

The consumption fields of EO in China mainly involve ethylene glycol, nonionic surfactant, ethanol amine, etc., with consumption proportion in 2012 accumulating to 90% or so. In future several years, due to the rapid growth of coal-based ethylene glycol capacity, the growth in the demand of ethylene glycol for EO will slow down, while the demand of fine chemical fields as ethanol amine and polyethylene glycol for EO will witness rapid growth.

Consumption Structure of EO in China (By Product), 2012



Source: ResearchInChina *China Ethylene Oxide Industry Report, 2012-2020*

The EO manufacturers in China mainly consist of subsidiaries of Sinopec and CNPC, joint ventures and a few private enterprises. As of August 2013, Sinopec's subsidiaries (including joint ventures) contributed 56.4% of total capacity of EO in China, and CNPC's subsidiaries contributed 9.6%; among the private enterprises, Ningbo Skyford and Sanjiang Chemical are both with relatively bigger EO capacity, respectively hitting 500 kilotons and 330 kilotons, and in particular, 500 kiloton capacity of Ningbo Skyford and 100 kiloton capacity of Sanjiang Chemical were both newly commissioned in H1 2013.

China Ethylene Oxide Industry Report, 2012-2020 mainly involves the following contents:

Supply & demand, competitive pattern, etc. of EO industry around the globe;
Demand & supply, import & export, competitive pattern, price trend, development prospect, etc. of EO in China;
Demand & supply, import & export, competitive pattern, price trend, etc. of upstream ethylene and ethanol industries of EO in China;
Demand & supply, import & export, competitive pattern, price trend, EO demand forecasting, etc. of downstream ethylene glycol, surfactant, ethanol amine, polycarboxylate water reducer, crystalline silicon cutting fluid and taurine industries of EO in China;
Operation, EO business, forecast and prospect, etc. of 8 EO producers in China;
Operation, EO downstream product business, forecast and prospect, etc. of 7 EO downstream product producers in China.

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