China Polyether Monomer (MPEG/APEG/TPEG) Industry Report, 2013-2015

Sep.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

In the Chinese market, polyether monomers mainly include polyethylene glycol monomethyl ether (MPEG), allyl polyoxyethylene ether (APEG) and methyl alkenyl polyoxyethylene ether (TPEG). In the wake of enhanced R & D capabilities and technological progress, polyether monomers have been widely used in the construction industry, daily chemical, pharmaceutical manufacturing and other fields, in which the construction industry (mainly polycarboxylate water reducing agents) consumes the most polyether monomers. In 2012, Chinese polycarboxylate water reducing agents need 360,000-420,000 tons of polyether monomers.

Liaoning Oxiranchem, Kelong Fine Chemical, Zhejiang Huangma and Shanghai Taijie act as major suppliers of polyether monomers, occupying 60-70% market share in China polycarboxylate water reducing agent industry. Wherein, attracted by high gross margin, the latter three enterprises have longitudinally extended into the polycarboxylate water reducing agent market.

In 2007-2012, China's output of polycarboxylate water reducing agents grew at a CAGR of 40.9%. In 2012, the output and sales volume of polycarboxylate water reducing agents amounted to approximately 2.3 million tons, accounting for 38% of the total consumption of water reducing agents which tended to become leading products in the water reducing agent industry.

As of the end of 2012, there had been over 1,000 polycarboxylate water reducing agent production enterprises in China, but most of them were small-sized complex formulation enterprises, only 10 ones mastered systematic and mature polycarboxylate water reducing agent concentrate and pumping agent synthesis technology.

In 2012, the combined capacity of polycarboxylate water reducing agents of top 10 enterprises totaled 2.197 million tons, and their combined sales volume hit 881,000 tons, equivalent to 38.3% of the total sales volume. Jiangsu Subote, Kelong Fine Chemical and Xiamen Academy of Building Research Group ranked top three, with the respective sales volume of 175,000 tons, 135,000 tons and 110,000 tons in 2012.

The report includes the following aspects:

※ Status quo, supply and demand, competition pattern and development trends of China polyether monomer industry;

※ Impact of supply, demand and prices of ethylene oxide, methanol, alkenyl alcohols, acrylic acid and other upstream materials on Chinese polyether monomer market;

※ Influence of polycarboxylate water reducing agent, surfactant and other downstream industries on Chinese polyether monomer market; operation and water reducing agent business of three Chinese polycarboxylate water reducing agent enterprises.

※ Operation and water reducing agent business of three foreign polyether monomer companies and six Chinese ones.

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