



**Global and China MO Source Industry
Report, 2014-2015**

Mar. 2014

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

Global demand for MO source from LED industry has accounted for more than 90% of the aggregate demand for MO source. New-generation solar cell, phase change memory, semiconductor laser and other areas are still in their infancy, and have not yet formed massive market demand.

Because of a higher gross margin of MO source product in the early days, the world's four major suppliers of MO source involving Dow Chemical, AKZO Nobel, SAFC Hitech and NATA expanded production over the past three years, resulting in the mushrooming of new entrants and increasing fierce market competition, and MO source product prices began to fall sharply.

Downstream of MO source mainly refers to the LED epitaxial chip industry, which in 2013 suffered mid/low-end overcapacity, causing chip price to ceaselessly fall; finally, most companies witnessed a continuous decline in profitability, at a loss. The downturn in epitaxial chip companies also directly affected the profitability of MO source manufacturers.

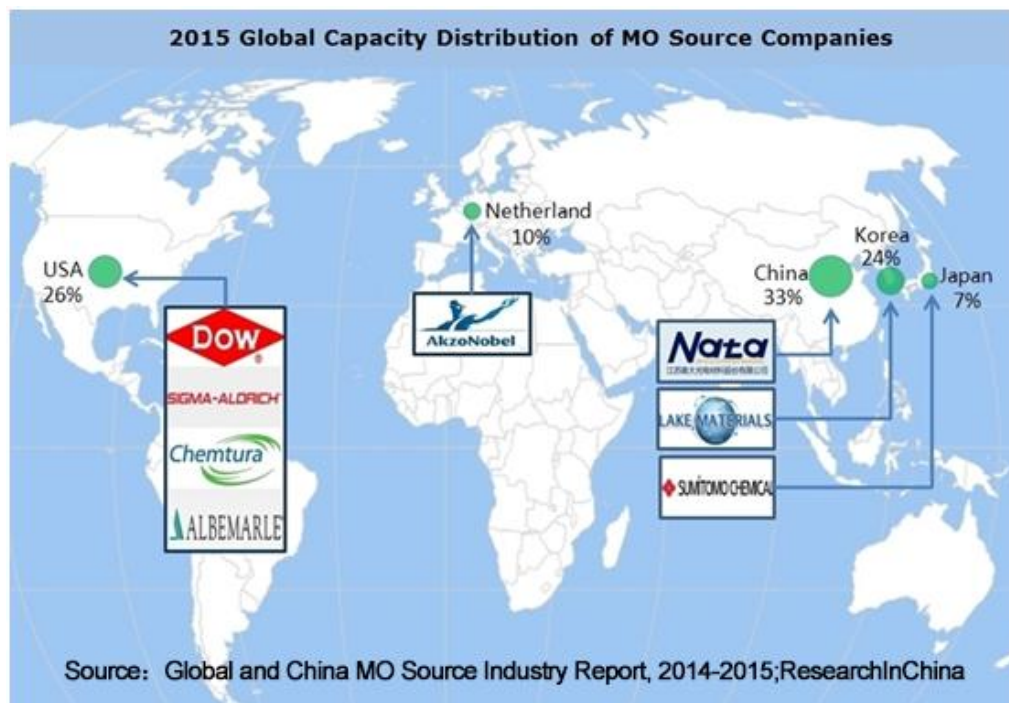
In February 2014, NATA released a newsletter about its 2013-year performance, according to which the company's revenue reached RMB135 million in 2013, down 23.81% YoY; and net income attributable to shareholders of the listed company decreased by 33.08% YoY to RMB60.3596 million.

In 2014, along with technological progress and falling prices of LED lighting products, LED lighting application demand will grow rapidly; MOCVD equipment capacity utilization will continue to rise and stimulate recovery in demand for upstream MO source. Therefore, MO source companies are expected to bottom out in 2014.

NATA, the domestic MO leader, has sufficient upstream raw materials of MO source such as gallium and indium with low cost. By virtue of cost advantage, NATA is likely to turn around performance in 2014.

Global and China MO Source Industry Report, 2014-2015 focuses on the followings:

- ✘ Development (industrial policies, laws and regulations) of MO source industry;
- ✘ Market size, market structure, supply and demand, competition pattern, etc. of MO source industry;
- ✘ Influences from upstream and downstream sectors on global and China MO source industry;
- ✘ Operation, development strategy, etc. of eight MO companies at home and abroad.



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