

Global and China Electronic Chemicals Industry Report, 2014-2017

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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 costeffective 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.

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Abstract

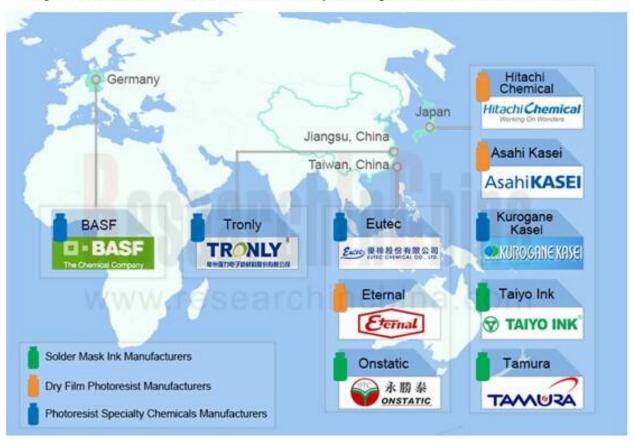
Electronic chemicals refer to a variety of chemicals and materials used in electronic components, printed circuit boards, consumer electronics and other industrial products. This report focuses on analyzing photoresist & its special chemicals and capacitor chemicals as well as maleic anhydride derivatives used in printed circuit boards, flat panel displays and semiconductors.

1 Photoresist

Photoresist is mainly used for fine graphics processing in PCB, LCD, semiconductor and other areas. In 2013, the global photoresist market scale reached approximately RMB40 billion, mainly held by Japanese, American, South Korean and Taiwanese enterprises. Take PCB photoresist market for example: in 2013, the combined market share of Asahi Kasei, Hitachi Chemical and Taiwan Eternal Chemical in the PCB dry film photoresist market was more than 80%; Taiyo Ink enjoyed a share of more than 50% in the PCB solder mask ink market.

China photoresist market is growing rapidly. In 2013, the share of China PCB photoresist market size in the global total rose to 64.3%; while the share of China LCD and semiconductor photoresist market scale was less than one-third of the world's total, and the development space is still large. China photoresist market is almost occupied by foreign companies; market share of Chinese counterparts was less than 10%, mainly including photoresist special chemical manufacturer Changzhou Tronly New Electronic Materials Co., Ltd., semiconductor g-line/i-line photoresist producer Beijing Kempur Microelectronics.Inc.

Major Global PCB Photoresist and Specialty Chemicals Manufacturers



Source: Global and China Electronic Chemicals Industry Report, 2014-2017 by ResearchInChina

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2 Capacitor chemicals

Capacitor chemicals are one of key raw materials to produce aluminum electrolytic capacitors, solid polymer capacitors and supercapacitors. In 2013, the global capacitor chemicals market size approximated RMB7 billion, with products mainly produced by Japanese, European, American and Chinese manufacturers, such as Sanyo Chemical Industries, Honeywell, and Shenzhen Capchem Technology.

China aluminum electrolytic capacitor chemicals industry is fairly mature, with its market scale making up about 50% of the global total in 2013, and chiefly dominated by Shenzhen Capchem Technology and foreign-funded enterprises.

3 Maleic Anhydride Derivatives

Maleic anhydride derivatives are mainly used for the packaging of electronic components. In 2013, global demand for maleic anhydride derivatives reached approximately 250 kt, the varieties that have larger demand are Methyl tetrahydrophthalic anhydride and

tetrahydrophthalic anhydride, main producers of which include Italian Polynt, New Japan Chemical, Hitachi Chemical and so on.

China maleic anhydride derivatives industry can basically achieve self-sufficiency, the demand of which accounted for about half of the world's demand in 2013. The main producers consist of Puyang Huicheng Electronic Material Co., Ltd, Jiaxing Orient Chemical Factory, and Jiaxing Qingyang Chemical Co., Ltd.

Global and China Electronic Chemicals Industry Report, 2004-2017 by ResearchInChina sheds light on the following:

- ◆Size and competition pattern of Global and China photoresist and special chemicals market, and development forecast for 2014-2017;
- ◆Size and competition pattern of Global and China capacitor chemicals market, and development forecast for 2014-2017;
- ◆Size and competition pattern of Global and China maleic anhydride derivatives market and development forecast for 2014-2017;
- ◆Operational analysis, electronic chemicals business analysis, development and forecast of 18 Global and Chinese electronic chemicals manufacturers.

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