Global and China Non-ionic Cellulose Ether Industry Report, 2014-2016

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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

The global non-ionic cellulose ether production is dominated by the United States, Japan and other developed countries, especially Dow Chemical, Ashland and ShinEtsu master about 75% of methylcellulose (MC) and hydroxypropyl methyl cellulose (HPMC) market.

In 2006-2013, the global non-ionic cellulose ether capacity grew steadily at a CAGR of 8.69%, reaching 491,000 tons in 2013. In recent years, the momentum of global cellulose ether capacity growth mainly comes from the Asian market, particularly China. In 2013, China's non-ionic cellulose ether capacity and output hit 195,000 tons and 154,000 tons respectively, of which, the MC/HPMC output approximated 133,000 tons.

In the United States, Western Europe and Japan, the profit of cellulose ether business is usually lower than economic benefits of reinvestment, and new factories are uncompetitive. However, the investment in the promising Chinese market is relatively low. As of the end of 2013, 10 Chinese non-ionic cellulose ether companies with the respective capacity of more than 10,000 tons had contributed 87.4% to the total non-ionic cellulose ether capacity in China; wherein, Shangyu Chuangfeng Chemical Co., Ltd. ranked first with 30,000 tons/a.

Products and Capacity of Major Cellulose Ether Manufacturers in China, 2013

Manufacturer	Capacity (ton/a)	Products
Shangyu Chuangfeng Chemical Co., Ltd.	30000	MC,HPMC,HEC,HEMC
Hercules Tianpu Chemicals Company Limited	See the report	MC,HPMC
Shandong Ruitai Chemical (Group) Co., Ltd.	See the report	MC,HPMC,HEC,HPC
Zhejiang Kehong Chemicals Co.,Ltd.	20000	MC,HPMC,HEC
Henan Tiansheng Chemical Industry Co., Ltd.	See the report	MC,HPMC,HEC,HEMC
Guangda Technological Development Co.,Ltd.	See the report	HEC,HPC,EC
Shandong Yiteng New Material Co., Ltd	See the report	HPMC
Zouping Fuhai Technology Development Co.,Ltd.	12000	HEC,HPMC
Shandong Head Co., Ltd.	See the report	MC,HPMC,EC,HEC,HPC
Hebei Zhicheng Fine Chemical Co., Ltd.	See the report	MC,HPMC,HPC,HEC
Zhejiang Haishen Chem Co., Ltd.	See the report	MC,HPMC,HEC,HEMC
Huzhou Mizuda Hope Bioscience CO., Ltd.	8000	MC,HPMC,HEC
Gomes Chemical (China) Co., Ltd.	See the report	HPMC,HEC
Shijiangzhuang Eastern Cellulose Co., Ltd.	See the report	HPMC
Shijiangzhuang Xinyuan Cellulose Co., Ltd.	2300	MC,HPMC

Source: Global and China Non-ionic Cellulose Ether Industry Report, ResearchInChina

Judging from the downstream demand, the demand for building materials-use cellulose ether is the largest. In 2013, China's non-ionic cellulose ether consumption amounted to 132,000 tons or so, of which building materials-use cellulose ether made 114,000 tons, accounting for 86.4% of the total consumption.

China's construction industry will return to a rational and healthy development track under strict government control policies, still accompanied by a steady increase in the demand for building materials-use cellulose ether. It is expected that the Chinese non-ionic cellulose ether market size will attain RMB5.2 billion, and the consumption 160,000 tons in 2016.

Global and China Non-ionic Cellulose Ether Industry Report, 2014-2016 by ResearchInChina mainly sheds light on the followings:

● Overview of the global non-ionic cellulose ether industry (including market size, market supply and demand, etc.);
● Development environment for China non-ionic cellulose ether industry (involving raw material market, policies, etc.);
● Size and forecast for the next three years, competitive landscape (capacity of top 15 companies), supply and demand, import and export of China non-ionic cellulose ether market;
● Market capacity, etc. of China non-ionic cellulose ether application industries (including building materials, pharmaceuticals, food additives, etc.);
● Operation, non-ionic cellulose ether business, etc. of international benchmarking enterprises such as ShinEtsu, Ashland and Dow Chemical;
● Operation, non-ionic cellulose ether business, etc. of 18 domestic non-ionic cellulose ether enterprises e.g. Shangyu Chuangfeng Chemical, Hercules Tianpu Chemicals, Shandong Ruitai Chemical, Shandong Head.

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