

Global and China Chemical Reagent Industry Report, 2014-2017

Sept. 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

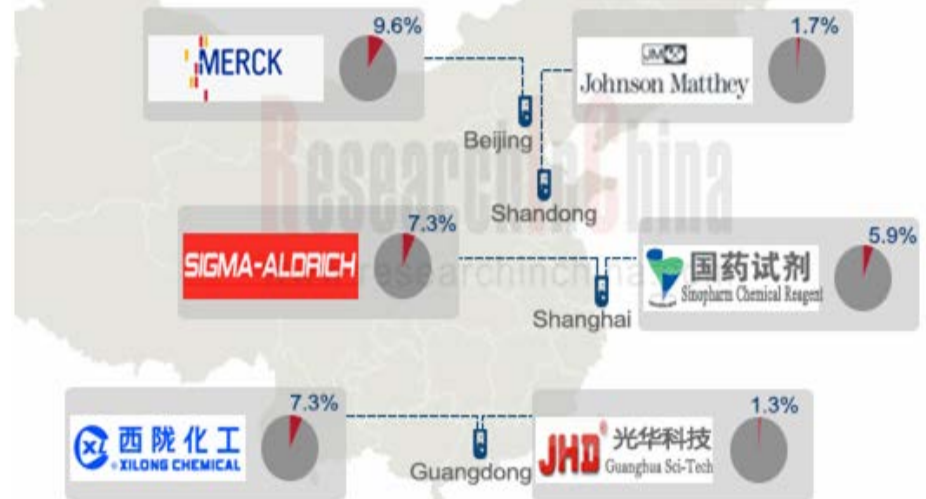
Chemical reagent, purified from industrial chemicals, serves chiefly scientific experiment and detection analysis, and finds massive application in electronic information, medicine, food, aerospace and military industry manufacturing.

In 2013, global chemical reagent market was worth about USD 13.6 billion, with market demand concentrated in United States, Europe and Japan. There are a large variety of chemical reagents, totaling above 250,000 around the world. American Sigma-Aldrich is the company that produces the most varieties of chemical reagents, up to approximate 230,000.

Global chemical reagent industry characterizes a fairly high concentration, and American Sigma-Aldrich and German Merck Group, as industry leaders, took up a combined 30% or so market share globally in 2013.

China chemical reagent industry has developed quickly, achieving a CAGR of 15.9% as concerns market size during 2007-2013, and making up 19.2% of global market size. Chemical reagent can be divided into general reagent and high-purity reagent, with the latter accounting for about 26% of total market size in China in 2013.

Main Enterprises and Their Market Share of Chemical Reagent Industry in China, 2013



Source: Global and China Chemical Reagent Industry Report, 2014-2017 by ResearchInChina

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High-purity chemical reagent is mainly used in semiconductor industry, and is the product that enjoys the fastest growth rate and has the highest technical content and added value. With the rapid development of China's electronic information, biotechnology, national defense, military industry and other industries, the demand for high purity reagent will keep a roughly 15% growth rate over the next couple years.

In 2013, there were more than 400 chemical reagent producers with production licenses in China, most of which focused on low-end products, resulting in fierce competition in the low-end market; by contrast, the high-end market is dominated by transnational companies, such as German Merck Group and American Sigma-Aldrich, which held a combined 16.9% market share in China in 2013.

In recent years, concentration of China chemical reagent industry has been improving gradually, mainly reflected by rapid development of large chemical reagent companies. Moreover, China-made chemical reagents are advancing from the low-end to the middle and high-end, with some imported products having been substituted with domestic ones. Typical domestic companies include Xilong Chemical Co., Ltd. and Sinopharm Chemical Reagent Co., Ltd., together occupying 13.2% of the Chinese market in 2013.

Global and China Chemical Reagent Industry Report, 2014-2017 by ResearchInChina focuses on the following:

- Size and competitive landscape of global chemical reagent market;
- Size, import & export, competitive landscape, price of and forecast for development during 2014-2017 of the Chinese chemical reagent market;
- Size of market segments (general reagent, reagent for PCB (a high-end variety in general reagent, separately listed in the report), high purity reagent) in China, and forecast for development of market segments during 2014-2017;
- Operation, chemical reagent business, development of and forecast for 15 global and Chinese chemical reagent producers.?

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