

**China Ethylene Oxide (EO) Industry Report,
2014-2020**

Nov. 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

Among ethylene derivatives, EO is an important organic chemical raw material, only second to polyethylene and polyvinyl chloride. In 2013, the global EO capacity was mainly distributed in Asia-Pacific, the Middle East and North America, wherein Asia-Pacific contributed 38% to the total capacity.

As one of main EO producing areas, China's total EO capacity had reached 5.428 million tons by the end of September 2014, accounting for about 18% of the global total.

Due to the rapid growth of EO capacity, China EO industry is confronted with overcapacity in 2013-2014; meanwhile, the operating rate of the industry falls to below 80%, and the profit dives. In 2014-2020, China's proposed and ongoing EO capacity will hit over 2 million tons, continuing the oversupply.

As of the end of September 2014, Chinese EO producers had mainly included Sinopec and PetroChina and their subsidiaries and joint ventures, occupying up to 67.9% of the EO capacity. In addition, private companies such as Ningbo Heyuan and Sanjiang Fine Chemicals also seize a certain market share.

In China, EO is mainly used for the production of glycol, which consumed 68.1% of EO in 2013. Commodity EO is often applied to the production of nonionic surfactant, polycarboxylate water reducer, ethanolamine, crystalline silicon cutting fluid, taurine and others. Particularly, the polycarboxylate water reducer market witnesses the fastest growth, sharing 8.4% of the EO demand in 2013.

1, Glycol

As of the end of September 2014, China's total glycol capacity had amounted to 5.985 million tons, of which the coal-based glycol capacity accounted for 29.2%. Currently, China has apparent cost advantages in coal-based glycol; with the maturity of the production process, coal-based glycol will gradually replace oil-based glycol, thereby the demand of glycol for EO will shrink.

In 2014, China's proposed and ongoing glycol capacity hits about 6 million tons, of which the coal-based glycol capacity occupies 80% or so. The coal-based glycol projects to be put into operation in 2015 embrace Elion's 300,000-ton project, Qianxi Coal Chemical's 300,000-ton project, Kailuan Group's 400,000-ton project and so on.

2, Polycarboxylate Water Reducer

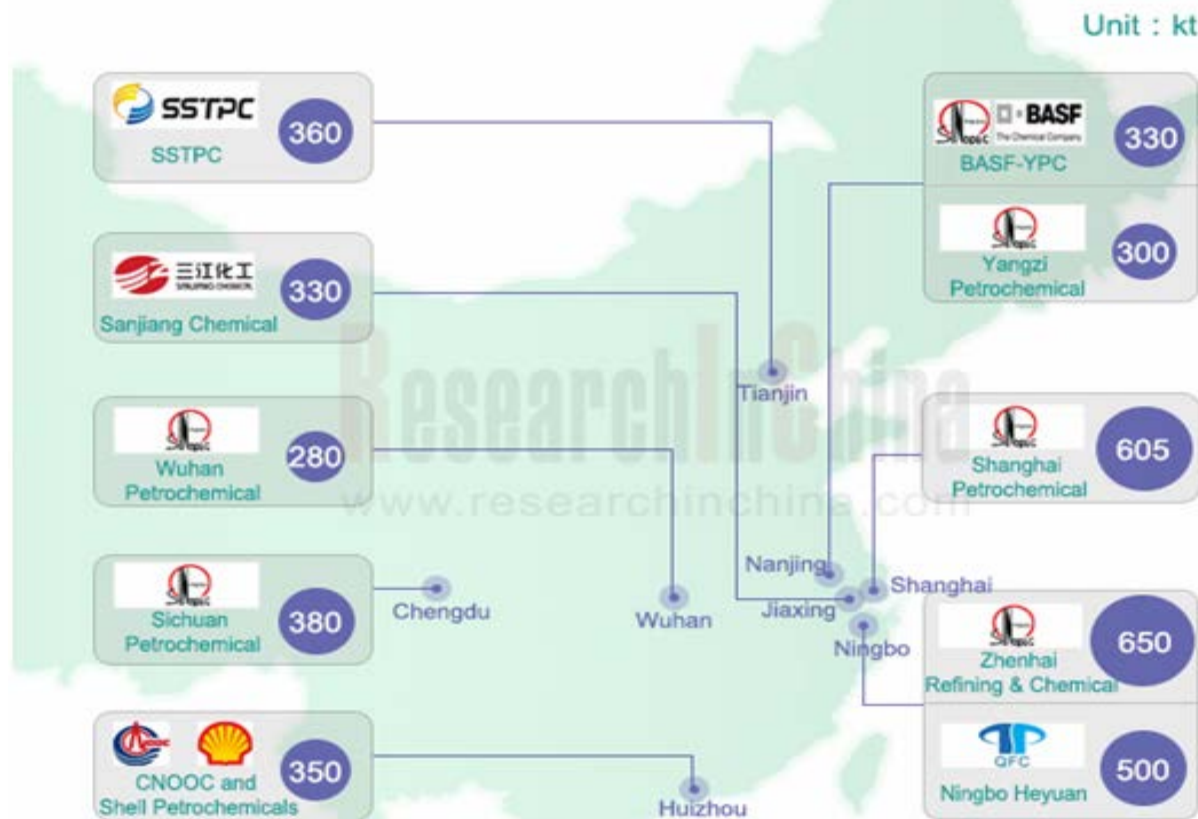
As the indirect downstream of EO, polycarboxylate water reducer is mainly used in the fields of railway, rail transit, nuclear power plants, ready-mixed concrete, etc., with the expected growth rate of around 15% in the coming years. In 2013, China's polycarboxylate water reducer output attained 3.6 million tons; by market share, Jiangsu Sobute, Xiamen Academy of Building Research Group and Tianjin Feilong ranked among the top three companies.

Polyether monomer is a main raw material of polycarboxylate water reducer. Major polyether monomer companies include Liaoning Oxiranchem and Kelong Fine Chemical. China's largest polyether monomer manufacturer -- Liaoning Oxiranchem sold 178,100 tons of polyether monomer and enjoyed around 40% market share in 2013.

The report covers the following:

- ✘ Supply & demand and competitive landscape of the global EO industry;
- ✘ China's EO supply & demand, import & export, competition pattern, price, and development forecast for 2014-2020;
- ✘ Supply & demand, competition pattern, import & export, price and the like of China's EO upstream industry (ethylene and ethanol);
- ✘ Supply & demand, competition pattern, import & export, development in 2014-2020, etc of China's EO downstream industry (glycol, surfactant, ethanamine, polycarboxylate water reducer, crystalline silicon cutting fluid and taurine);
- ✘ Operation, EO-related business, anticipation and outlook of 15 Chinese EO and downstream enterprises.

Capacity of Top10 EO/EG Manufacturers in China as of end Sep.2014



Source : China Ethylene Oxide Industry Report, 2014-2020 by ResearchInChina

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