Global and China MO Source Industry Report, 2014-2018

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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

As the backing material of MOCVD, MOMBE and other semiconductor microstructures, MO source (also known as high-purity metal organic compound) is widely used in LED (accounting for about 90% of the demand), solar cells, phase change memory, radio-frequency integrated circuit (RFIC) chips, etc.

The global demand for MO source was small prior to 2009, with a basic balance between market supply and demand. In 2009-2011, the explosive growth in the LED industry propelled the demand for MO source to grow swiftly, resulting in the global oligopoly and the gap of about 4.8 tons in 2011. After 2012, the slowdown of the LED market and new capacity release of major companies led to the oversupply worldwide.

China is one of the world's major MO source producers and consumers. In 2014, China's MO source capacity hit 28.5 tons, making up about 30% of the global total; it is expected to jump to 33.6 tons in 2015. China's demand for MO source attained 23.5 tons in 2014, occupying around 40.4% of the global; driven by the continued growth in MOCVD shipment, the demand is expected to reach 32.7 tons in 2015.

Currently, the global MO source market is dominated by several tycoons. In 2014, DOW, SAFC, Nata Opto-electronic and AKZO Nobel eyed a combined market share of about 92.2% (by sales); particularly DOW grasped 37.8% alone. Japan-based Sumitomo Chemical, South Korea-based Lake LED Materials and China-based Suzhou Guangyao have formed sizable production of MO source, but their capacity is not high enough, so they are still weak in the global competition.

DOW is the largest MO source manufacturer in the world. It entered the Chinese market as early as 1930s, and now China has become its second-largest overseas market following Germany with the sales contribution of RMB4.3 billion in 2014. To serve the Greater China region better, DOW set up a sales base in Chengdu in 2012; it erected sales bases in Harbin and Wuhan in 2014; in 2015, it plans to establish a sales base in Xinjiang (according to China's "The Belt and Road Initiative" strategic layout).

Jiangsu Nata Opto-electronic Material Co., Ltd. is China's largest MO source company with an existing capacity of 27.5 t/a. In May 2014, the company invested RMB28.41 million in a new 1.5 t/a high-purity trimethyl indium production line project, consisting of a trimethyl indium synthetic line and two trimethyl indium purification lines.

The report focuses on the followings:

Global MO source supply, demand, competition pattern, etc.;

China's MO source development environment, supply, demand, price, etc.;

Status quo of Chinese MO source upstream and downstream industries;

Operation, revenue structure, MO source business, etc. of eight MO companies at home and abroad.

MO Source Sales and Production Bases of Global Main Manufacturers, 2014

Manufactures	MO Source Production Bases	Sales (RMB mln)	Main Customer Location
DOW	America Korea Taiwan	310	Korea America Europe Taiwan
SIGMA-ALDRICH	Britain America Taiwan Wuxi	240	Europe America
Nata	Anhui Suzhou	140	China Europe
AkzoNobel	America Ningbo	65	Korea Taiwan
SUMITOMO CHEMICAL	Japan	30	Japan

Source: *Global and China MO Source Industry Report, 2014-2018;* ResearchInChina

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