



Global and China Biodegradable Plastics Industry Report, 2014-2018

Sep. 2015

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

Biodegradable plastics are polymer materials which are quickly degradable through microbial life activities in natural environments or under conditions of composting. Currently, more than 70% of global biodegradable plastics are used in the packaging industry.

In recent years, with the continued promotion of the low-carbon economy, the global biodegradable plastics output has maintained a high growth rate, attaining about 668 kilotons in 2014. All over the world, only plastarch material (PSM), polylactic acid (PLA), polybutylene succinate (PBS), etc. have realized industrial production. In 2014, PSM, PLA and PBS accounted for 41%, 24% and 21% of the world's total output, respectively.

Global demand for biodegradable plastics is mainly concentrated in Europe and North America, and their demand accounted for approximately 70% in 2014 together. However, in recent years, the Asian market has generated fast-growing demand, which is expected to represent 32.3% in 2018.

Global biodegradable plastics enterprises are mainly from Europe, America and Japan, such as Europe-based BASF, Novamont and Corbion, America-based NatureWorks and Metabolix, Japan-based Mitsubishi Chemical and Showa Denko. By capacity, BASF and NatureWorks top the list with respective capacities of 140 kt/a PBS and 140 kt/a PLA.

At present, Chinese biodegradable plastics market witnesses oversupply, most manufacturers rely on exports, and the domestic demand stays at a low level. However, as the government pays more attention to energy waste and environmental protection, biodegradable plastics industry policies are expected to be launched soon, thus stimulating China's demand for biodegradable plastics swiftly. In 2014, China's biodegradable plastics capacity reached around 380 kilotons, mainly serving packaging film, agricultural film, household plastics and other fields.

In 2014, Chinese biodegradable plastics manufacturers included Wuhan Huali Environment Technology, Kingfa Sci & Tech, Tianjin Danhai, Shandong Fuwin, Shenzhen Rainbow Fine Chemical Industry, etc. The capacity of these five companies accounted for about 40% of the national total capacity.

Now, China intends to build numerous biodegradable plastics projects, including a 90 kt/a PBSA Phase II expansion project of Kingfa Sci & Tech, a 20 kt/a biodegradable plastics PBS project Phase II of Yifan Xinfu Pharmaceutical, a 60 kt/a low-carbon biodegradable materials and products project of Shenzhen Rainbow Fine Chemical Industry, a 60 kt/a bio-plastics R & D production base project of Wuhan Huali Environment Technology.



Source: Global and China Biodegradable Plastics Industry Report, 2014-2018 by ResearchInChina

The report mainly covers the followings:

- ✘ Supply and demand, product mix, regional structure, competition pattern, development trends of global biodegradable plastics market;
- ✘ Supply and demand, competition pattern, development trends of Chinese biodegradable plastics market;
- ✘ Development status and competition pattern of biodegradable plastic product segments such as PSM, PLA, PHA, PBS;
- ✘ Operation, biodegradable plastics business, prospects, etc. of 25 domestic and foreign biodegradable plastics manufacturers.

1. Overview of Biodegradable Plastics

Industry

- 1.1 Definition
- 1.2 Classification
- 1.3 Industry Chain

2. Global Biodegradable Plastics Market

- 2.1 Supply and Demand
- 2.2 Product Mix
- 2.3 Regional Structure
 - 2.3.1 USA
 - 2.3.2 Europe
 - 2.3.3 Japan
 - 2.3.4 Brazil
 - 2.3.5 Thailand
- 2.4 Technology Trends
- 2.5 Competition Pattern
- 2.6 Development Trends

3. China Biodegradable Plastics Market

- 3.1 Market Supply
- 3.2 Market Demand
- 3.3 Competition Pattern
- 3.4 Policy Trends
- 3.5 Development Trends

4. Biodegradable Plastics Market Segments

- 4.1 Plastarch Material (PSM)
 - 4.1.1 Development Status

- 4.1.2 Competition Pattern
- 4.2 Polylactic Acid (PLA)
- 4.3 Polyhydroxyalkanoates (PHA)
- 4.4 Polybutylene Succinate (PBS)
- 4.5 Others
 - 4.5.1 Polycaprolactone (PCL)
 - 4.5.2 Polypropylene Carbonate (PPC)
 - 4.5.3 Aliphatic-Aromatic Copolyester
 - 4.5.4 Polyvinyl Alcohol (PVA)

5. Main Foreign Players

- 5.1 BASF
 - 5.1.1 Profile
 - 5.1.2 Operation
 - 5.1.3 Operation of Functional Materials & Solutions Division
 - 5.1.4 Biodegradable Plastics Business
 - 5.1.5 Business in China
- 5.2 NatureWorks
- 5.3 Novamont
- 5.4 DuPont
- 5.5 Mitsubishi Chemical
- 5.6 Showa Denko
- 5.7 Corbion

6. Main Chinese Players

- 6.1 Kingfa Sci & Tech
- 6.2 Yifan Xinfu Pharmaceutical

- 6.3 Shenzhen Rainbow Fine Chemical Industry
- 6.4 Wuhan Huali Environment Technology
- 6.5 Anqing Hexing Chemical
- 6.6 Others
 - 6.6.1 Zhejiang Hisun Biomaterials Co., Ltd.
 - 6.6.2 Ningbo Tianan Biologic Material Co., Ltd.
 - 6.6.3 Zhejiang Tianhe Environmental Technology Co., Ltd.
 - 6.6.4 Henan Yongle Biological Engineering Co., Ltd.
 - 6.6.5 Maanshan Tong-Jie-Liang Biomaterials Co., Ltd.
 - 6.6.6 Zhejiang Wafa Ecosystem Science & Technology Co., Ltd.
 - 6.6.7 Fujian Beststarch Biodegradable Material Co., Ltd.
 - 6.6.8 Guangdong Shangjiu Biodegradable Plastics Co., Ltd.
 - 6.6.9 Shandong Fuwin New Material Co., Ltd.
 - 6.6.10 Tianjin Danhai Co., Ltd.
 - 6.6.11 Tianjin GreenBio Materials Co., Ltd.
 - 6.6.12 Shenzhen BrightChina Industrial Co., Ltd.
 - 6.6.13 Xinjiang Blue Ridge Tunhe Chemical Industry Joint Stock Co., Ltd.

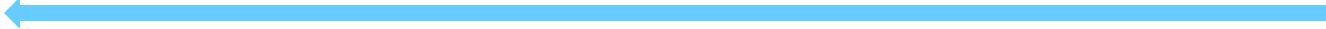
7. Summary and Forecast

- 7.1 Summary
- 7.2 Supply and Demand Forecast
 - 7.2.1 Global Market
 - 7.2.2 Chinese market

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- Classification and Usage of Biodegradable Plastics (by Raw Materials)
 - Biodegradable Plastics Industry Chain
 - Global Biodegradable Plastics Output, 2013-2015
 - Global Biodegradable Plastics Demand Structure by Usage, 2014
 - Global Biodegradable Plastics Output Structure by Variety, 2014
 - Global Biodegradable Plastics Demand Structure by Region, 2013
 - Global Biodegradable Plastics Capacity Structure by Region, 2014
 - Major Events of Japanese Enterprises Engaged in Biodegradable Plastic Application Development
 - Biodegradable Plastic Technology Development, 2008-2015
 - Main Biodegradable Plastic Enterprises and Their Capacity in the World, 2014
 - China's Biodegradable Plastic Capacity and Growth Rate, 2009-2015
 - China's Plastic Film Output and YoY Growth, 2009-2015
 - China's Agricultural Film Output and YoY Growth, 2009-2015
 - Capacity of Main Biodegradable Plastics Enterprises in China, 2013
 - Policies of China's Biodegradable Plastics Industry
 - Main Constituents and Source of PSM
 - Capacity Distribution of PSM Companies in the World, 2014
 - Properties and Applications of PLA
 - Capacity of Main PLA Companies in the World, 2014
 - Main Application of PHA in Medicine
 - Evolution of PHA
 - Capacity of Main PHA Companies in the World, 2014
 - Capacity of Main PBS Companies in the World, 2014
 - Main PPC Companies and Their Capacity in China, 2014
 - BASF's Divisions and Main Business

- BASF's Revenue and Net Income, 2010-2015
- BASF's Revenue Structure (by Division), H1 2015
- Revenue and EBITDA of BASF's Functional Materials & Solutions Division, 2012-2015
- Sales of BASF's Functional Materials & Solutions Division (by Product), 2013-2015
- Revenue Structure of BASF's Functional Materials & Solutions Division (by Product), 2013-2015
- Revenue Structure of BASF's Functional Materials & Solutions Division (by Region), 2014
- Composition and Usages of Ecoflex and Ecovio
- DuPont's Net Sales and Net Income, 2010-2015
- DuPont's Revenue Structure (by Division), 2013-2015
- DuPont's Revenue Structure (by Region), 2012-2014
- Net Sales and Net Income of Mitsubishi Chemical, FY2010-FY2014
- Operational Fields and Main Business of Revenue Structure of Mitsubishi Chemical, FY2014
- Net Sales and Net Income of Showa Denko, 2010-2015
- Net Sales Structure of Showa Denko (by Division), H1 2015
- Purac's Main Products and Business Fields
- Corbion's Revenue and EBITDA, 2012-2015
- Corbion's Net Sales Structure (by Division), 2014
- Revenue Contribution of Corbion's Biochemical Division (by Product), 2014
- Corbion's Net Sales Structure (by Region), 2014
- Purac's Plants, 2014
- Revenue and Net Income of Kingfa Sci & Tech, 2010-2015
- Revenue of Kingfa Sci & Tech (by Product), 2013-2015
- Revenue Structure of Kingfa Sci & Tech (by Product), 2013-2015
- Revenue of Kingfa Sci & Tech (by Region), 2013-2015
- Revenue Structure of Kingfa Sci & Tech (by Region), 2013-2015

- R & D Costs and% of Total Revenue of Kingfa Sci & Tech, 2013-2015
- Total Assets and Net Income of Zhuhai Wantong, 2012-2015
- Revenue and Net Income of Yifan Xinfu Pharmaceutical, 2010-2015
- Revenue of Yifan Xinfu Pharmaceutical (by Product), 2014-2015
- Revenue Structure of Yifan Xinfu Pharmaceutical (by Product), 2014-2015
- Revenue of Yifan Xinfu Pharmaceutical (by Region), 2014-2015
- Revenue of Yifan Xinfu Pharmaceutical (by Region), 2014-2015
- Gross Margin of Yifan Xinfu Pharmaceutical (by Product), 2014-2015
- R & D Costs and% of Total Revenue of Yifan Xinfu Pharmaceutical, 2013-2015
- Polymer Materials Revenue of Yifan Xinfu Pharmaceutical (by Product), 2012-2014
- Polymer Materials Revenue Structure of Yifan Xinfu Pharmaceutical (by Product), 2012-2014
- Gross Margin of Polymer Materials Business of Yifan Xinfu Pharmaceutical (by Product), 2014
- Revenue and Net Income of Yifan Xinfu Pharmaceutical, 2014- 2018E
- Revenue and Net Income of Shenzhen Rainbow Fine Chemical Industry, 2010-2015
- Revenue of Shenzhen Rainbow Fine Chemical Industry (by Product), 2013-2015
- Revenue Structure of Shenzhen Rainbow Fine Chemical Industry (by Product), 2013-2015
- Revenue of Shenzhen Rainbow Fine Chemical Industry (by Region), 2013-2015
- Revenue Structure of Shenzhen Rainbow Fine Chemical Industry (by Region), 2013-2015
- R & D Costs and% of Total Revenue of Shenzhen Rainbow Fine Chemical Industry, 2013-2015
- Output and Sales Volume of Bio-based Materials and Products of Shenzhen Rainbow Fine Chemical Industry, 2012-2014
- Revenue and Net Income of Shenzhen Rainbow Fine Chemical Industry, 2013-2015
- Revenue and Net Income of Shenzhen Rainbow Fine Chemical Industry, 2014- 2018E
- Development Process of Biodegradable Plastics Business of Wuhan Huali Environment Technology
- Global Demand and Output Structure of Biodegradable Plastics (by Region), 2014
- Biodegradable Plastics Capacity Comparison between Global and Chinese Enterprises, 2014

- 
- Global Biodegradable Plastics Output and Growth Rate, 2014- 2018E
 - Global Biodegradable Plastics Applications, 2018E
 - Global Biodegradable Plastics Demand Structure (by Region), 2018E
 - Output of Plastic Films, Agricultural Film and Biodegradable Plastic Film in China, 2014-2018E

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