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.
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.
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