# China Polyether Monomer (MPEG/APEG/TPEG) Industry Report, 2015-2018

Dec. 2015

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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

Polyether monomer in the Chinese market mainly refers to methoxy polyethylene glycol (MPEG), allyloxy polyethylene glycol (APEG), tresylated polyethylene glycol (TPEG) and isobutylene alcohol polyoxyethylene ether (HPEG). The field in which polyether monomer finds most application comes to polycarboxylate superplasticizer, whilst a small amount of polyether monomer gets used in daily chemical and pharmaceutical chemical additives and the like.

In the early development of Chinese polycarboxylate superplasticizer, polyether monomer was represented by MPEG and APEG. From 2009 onwards, the gradual localization of initiator materials reduces the prices of TPEG and HPEG significantly, so that TPEG and HPEG have become mainstream products on the polycarboxylate superplasticizer market. In 2014, TPEG and HPEG seized 95% share of the Chinese superplasticizer market in terms of application.

In the fast-growing Chinese polycarboxylate superplasticizer market, the growth in demand is mainly attributed to the jumping downstream demand and the substitution for the second-generation superplasticizer in recent years. In 2014, polycarboxylate superplasticizer has become a mainstream product in Chinese superplasticizer market, because it accounts for 67.1% of the total superplasticizer demand.

In 2007-2014, China's polycarboxylate superplasticizer sales volume presented a CAGR of 41.9%, hitting 4.801 million tons in 2014; the demand for polyether monomer approximated 750,000 tons.

Driven by the development of China's economy and infrastructure construction, the demand for polycarboxylate superplasticizer is expected to maintain the growth rate of about 15% in the next few years, which will further propel the demand for polyether monomer.

As epoxy ethane, the main raw material of polyether monomer, cannot be transported over long distances, China's polyether monomer production is concentrated in main epoxy ethane producing areas, namely East China, Northeast China and North China (particularly East China where most manufacturing enterprises are located).

Large Chinese polyether monomer manufacturers -- Liaoning Oxiranchem, Liaoning Kelong Fine Chemical, Zhejiang Huangma, Shanghai Taijie and Jiahua Chemical enjoyed a combined market share of over 60% (in the polycarboxylate superplasticizer market) in 2014. As the world's largest producer of high-performance concrete superplasticizer polyether, Liaoning Oxiranchem sold 210,000 tons of polyether monomer in 2014 and it is building the epoxy ethane derivative capacity of 127,000 tons.

In the polycarboxylate superplasticizer market, there are more than 1,000 manufacturers in China, but most of them are small enterprises focusing on compounding, whereas merely less than 20 ones of them master systematic and mature polycarboxylate superplasticizer concentrate and pumping agent synthesis technologies.

In 2014, the top 9 Chinese polycarboxylate superplasticizer companies obtained the market share of 17.1%, especially Jiangsu Sobute and Xiamen Academy of Building Research Group witnessed the highest sales volume of 204,300 tons and 135,500 tons respectively.

**Major Chinese Polyether Monomer Enterprises and Related Business Development by the end of Nov 2015**

| | |
|---|---|
| 奥克股份 OXIRANCHEM | Oxiranchem has about 810kt EOD capacity, and 127kt are being built. Polyether monomer sales volume reached 209.8kt in 2014. |
| KELONG CHEMICAL 科隆精化 | Kelong Chemical has 132kt EOD capacity and 30kt are being built, 67kt polycarboxylate superplasticizer capacity and 100kt are being built. Polyether monomer sales volume reached 48.5kt in 2014. |
| JIAHUA 佳化化学 | Jiahua Chemicals' nonionic surfactant output and sales volume reached 113.7kt and 110.5kt respectively in Q1-Q3 2014. |
| 浙江皇马 ZHUANGMA | The subsidiary Zhejiang Lukean Chemical Co.,Ltd has 41kt/a special polyether, 6kt/a polyether amine, 3kt/a methylallyl alcohol and other by-products production capacity. |
| 台界化工 TAIJIE CHEMICAL | Taijie Chemical has 50kt polyether for polycarboxylate superplasticizer and 20kt macromonomer/ superplasticizer masterbatch capacity. In 2014, the company planned to build 50kt/a polyether and 50kt/a polycarboxylic acid production line in Chengdu. |
| 建研集团 XMABR | The subsidiary KZJ New Materials Group's polycarboxylate superplasticizer production capacity and sales volume reached 450kt and 135.5kt respectively in 2014. |
| 苏博特 SOBUTE | Sobute' s polycarboxylate superplasticizer production capacity and sales volume reached 330kt and 244.3kt respectively in 2014. In addition, the company planned to build 200kt/a high-performance admixture project in Xinjiang and 600kt/a high-performance concrete admixture project Taizhou. |

**Source: *China Polyether Monomer (MPEG/APEG/TPEG) Industry Report, 2015-2018* compiled by ResearchInChina**

China Polyether Monomer Industry Report, 2015-2018 by ResearchInChina contains the followings:

- Status quo, market supply & demand, competition pattern, prospects, etc. of Chinese polyether monomer industry;
- Supply & demand, competitive landscape and prices of upstream raw materials such as epoxy ethane, methanol, acrylic acid and the like;
- Operation, polyether monomer business, prospects, etc. of 3 foreign polyether monomer companies and 6 Chinese counterparts;
- Operation, superplasticizer business, prospects, etc. of 4 polycarboxylate superplasticizer companies in China.

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**Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080**
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