

**Global and China MO Source Industry  
Report, 2016-2020**

**Jul. 2016**

## **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

MO source (also known as high-purity metal organic compound) is one of the core materials for manufacturing LED, new generation of solar cells, phase change memory, semiconductor laser, RFIC (radio frequency integrated circuit) chip, etc.

In 2015, global MO source demand attained 56.2 tons, edging down 3.3% YoY, mainly because: first, LED product penetration had been close to saturation in the field of large-screen TV backlight and LED TV backlight market demand started to shrink; second, flip-chip LED technology squeezed the market space of LED backlight.

In 2015, output value of Chinese LED upstream epitaxial chips, midstream packaging and downstream application rose 8.3%, 13.0% and 15.8% respectively, thus driving Chinese MO source demand to go up by 15.3% YoY to 27.1 tons. In 2016, stimulated by favorable factors such as “Made in China 2025” and “One Belt and One Road”, China’s LED industry will continue to enjoy steady development and see MO source demand growing to 29.9 tons.

Due to high technical barriers, the whole MO source industry is now in oligopoly and monopolistic competition. In 2015, global MO source market CR5 reached 94.5%.

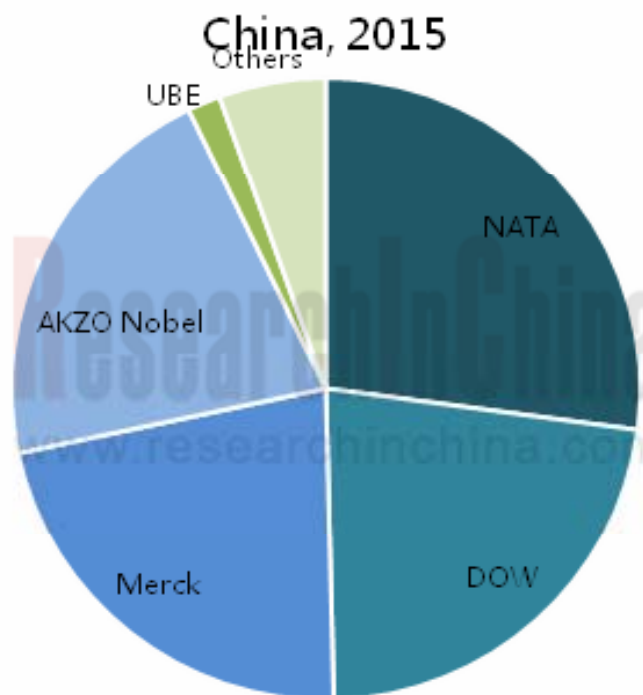
**Jiangsu Nata Opto-electronic Material Co., Ltd.** boasting MO source capacity of 27.5t/a is the biggest MO source manufacturer in China. In June 2016, it put a 2.5t/a trimethylindium production line and two trimethylindium purification lines into production.

**Dow**, one of the world’s leading MO source suppliers, entered the field of MO source through the acquisition of Rohm & Haas in 2009. In November 2015, it announced the forthcoming merger with DuPont. Currently, matters relating to the merger are steadily advancing.

**Suzhou Pure Opto-electronic Material Co., Ltd.** is a newcomer in the field of MO source. In 2016, it has formed an annual production capacity including 10 tons of trimethylgallium, 2.5 tons of triethylgallium and 800 kilograms of trimethylindium. Along with the ongoing research and development of triethylindium, magnesium, trimethylaluminum and more, the company is expected to achieve the production of MO source series in years to come.

## Market Competition Structure of MO Source in

China, 2015



The report highlights the following:

- General development situation, supply, demand, competition pattern, etc of global MO source industry;
- Development environment, supply, demand, market price trend, etc. of Chinese MO source industry;
- Market overview, market size, market structure, market price, etc. of main upstream industries (gallium, indium, etc.) and downstream application industries (LED, new solar cell, phase change memory, semiconductor laser, RFIC chip, etc.) of MO source;
- Operation, layout-in-China, revenue structure, MO source business, etc. of 9 global MO source manufacturers.

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