



Global and China Superabsorbent Polymers (SAPs) Industry Report, 2016-2020

Aug. 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

Super absorbent resin (SAP) is the key raw material with which to produce disposable hygiene products like baby diapers, feminine hygiene products, and adult incontinence products. SAP has super water absorbing capacity. At present, the global paper diaper market is experiencing rapid development, with an AAGR of over 15%. In 2015, the global SAP consumption increased by 8.0% year on year to 2.3 million tons. It is expected that in 2016~2020 the consumption would grow at a compound annual rate of some 7.8%, to an estimated 3.48 million tons by 2020.

At the end of 2015, the global SAP capacity reached 3.489 million tons per year, up 12.0% from a year earlier. And China contributed the largest portion of the global capacity, at 30.5% of the total.

China's SAP has developed at an astonishing pace over the past two years, with 2015's consumption rising 21.3% to 382 kilotons. However, with the introduction of Two-child Policy, and particularly driven by the rapid development of disposable hygiene products market, the SAP consumption in China is expected to grow at an average annual rate of 20% in 2016-2020, to 1.02 million tons by 2020.

Competitive Landscape of SAP:

From the corporate perspective, the global SAP market is monopolized by Japanese and German manufacturers. In 2015, the top five global producers—Evonik, Nippon Shokubai, BASF, Sumitomo Seika Chemicals, and SDP Global accounted for an aggregate of 70.1% of the global total capacity.

At present, there are more than 20 SAP producers in China, which are mainly wholly foreign-owned companies or joint ventures. In 2015, Yixing Danson Technology, San-Dia Polymers (Nantong), Formosa Industries (Ningbo), BASF-YPC Company Limited, and Nisshoku Chemical Industry (Zhangjiagang) occupied a combined 63.0% of the total capacity in China.

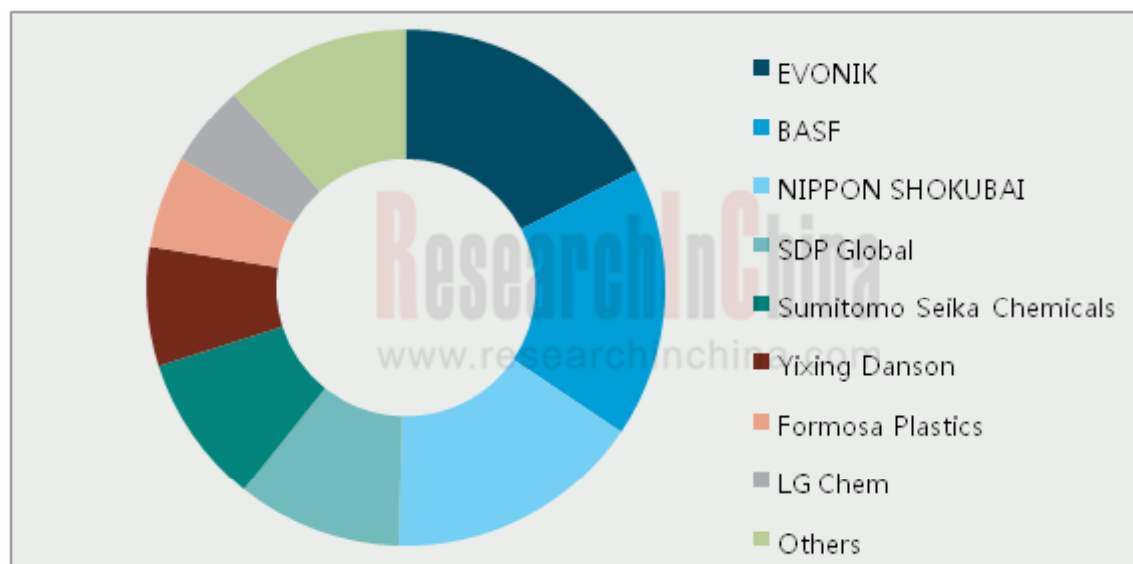
Prices of SAP:

In 2013-2016, affected by economic slowdown, rapid growth of SAP capacity, and overcapacity of upstream raw materials, the average prices for SAP declined year by year, to RMB15,500/ton at the end of 2013. But the price dropped to RMB9,150/ton through 2015. In 2016, the price fluctuated at around RMB9,000. The quoted prices of major producers stood at about RMB10,000, but the actual prices were still highly flexible.

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The prices for overseas SAP products have also showed downward trend. This has been particularly true in the past two years, with the prices for Japanese SAP products falling from RMB16,000/ton in 2014 to RMB12,000/ton in 2016. Nevertheless, the Chinese SAP products have a certain gap in price with foreign products, which is mainly related to the fact that the Chinese SAP products have a certain gap in technology and quality with foreign products.

Market Share of Major Global Manufacturers by SAP Capacity, 2015



Source: ResearchInChina

Global and China Superabsorbent Polymers (SAP) Industry Report, 2016-2020 mainly focuses on the following:

- Supply and demand, regional structure, and competitive landscape of the global SAP market;
- Supply and demand, regional structure, and competitive landscape of China's SAP market;
- Supply and demand and development trend of acrylic acid in China;
- Market size, SAP demand, and development trend of China's major SAP downstream sectors including baby diaper pads, adult incontinence products , and feminine hygiene products;
- Operation and development in China of 6 global SAP companies;
- Operation and development strategy of 12 key Chinese SAP companies;
- Prediction of development trend in global and China SAP market, 2016-2020.

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