



**Global and China Ethylene Oxide (EO)
Industry Report, 2017-2021**

July 2017

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

Ethylene oxide (EO) is one of the major derivatives of the ethylene industry. Featured with special reactivity, it can generate a series of fine chemical products for a wide range of applications.

In 2016, the global EO capacity was 34.5 million tons / a, with the CAGR of 4.3% in 2011-2016. It is estimated to grow at the annual average growth rate of around 2.0% in 2017-2021, lower than that in previous years because of overcapacity and the slowdown of downstream demand growth.

China is a leading EO supplier in the world, with the EO capacity of 7.43 million tons / a in 2016 (21.5% of the world's total) and the CAGR of 15.0% in 2011-2016, making it become the main driving force for the global EO capacity growth. Due to overcapacity and falling prices, the capacity growth has slowed down in the past two years significantly; the capacity is expected to hit 8 million tons / a in 2017 and 9.5 million tons / a in 2021.

In recent years, the development of China's EO industry characterizes the following:

1, Commercial EO accounts for a higher proportion

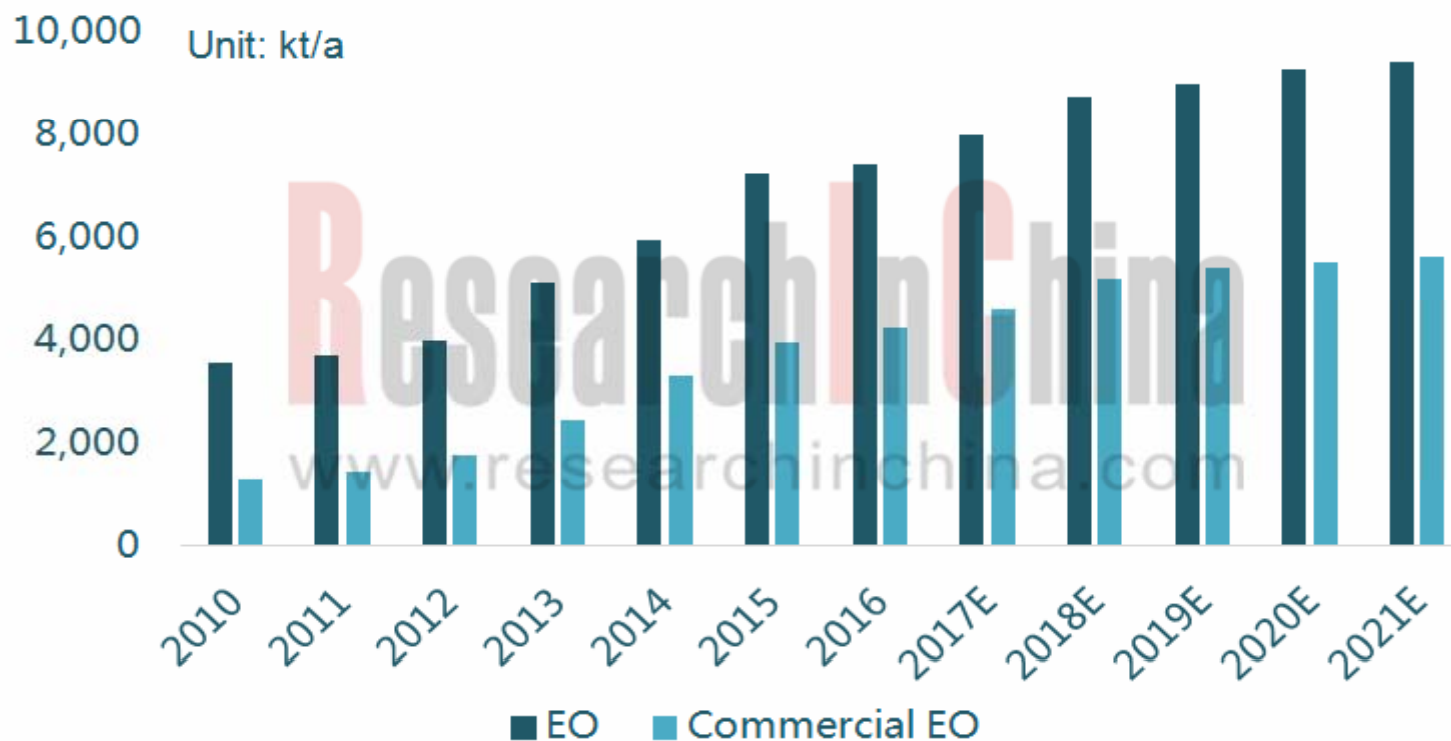
In 2016, China's commercial EO (not used for glycol) capacity accounted for 56.9% of the total EO capacity, up 20.2 percentage points from 2010, mainly because:

- 1) China mainly exploited EO for the production of glycol in early time, while it has altered or built commercial EO-based capacity in recent years;
- 2) The demand of polyether-based superplasticizer for EO grew rapidly.

2, The market monopoly is gradually broken

Before 2010, more than 70% of China's EO capacity concentrated in Sinopec and PetroChina. In recent years, the market share of these two tycoons has been gradually squeezed by private enterprises, foreign-funded enterprises and military enterprises. In 2016, the capacity contribution of Sinopec and PetroChina fell to about 50%.

China's EO Capacity, 2010-2021



Source: ResearchInChina

3, The price stops dropping to stabilize

The overcapacity dragged down China's EO price after 2011, but the slowdown in capacity expansion has eased the price decline rate in the past two years, even with a slight rebound in 2016. In 2017, the EO price will rise at first and then fall under the impact of the fluctuating ethylene price, while the average price is expected to be the same with 2016.

4, The demand for fine chemical-use EO continues to grow

In 2016, China's demand for fine chemical-use commercial EO occupied about 40%, higher than the global average. Wherein, the market demand from polyether-based superplasticizer jumped the fastest, with the CAGR of up to 32.9% in 2011-2016, mainly thanks to the rapid development of China's rail transit engineering and nuclear power engineering.

The report covers the following:

- ◆ Definition, production technology, industrial chain, etc. of the EO industry;
- ◆ Market size, market structure, competitive landscape, etc. of the global EO industry;
- ◆ China's EO market size, market structure, import & export, competitive pattern, market price, etc.;
- ◆ Supply & demand, import & export, price and the like of the EO upstream industry (ethylene and ethanol);
- ◆ Supply & demand, import & export, competitive pattern, price and the like of the EO downstream deep processing industry (glycol, nonionic surfactants, ethanolamine, polycarboxylate superplasticizer, taurine, etc.);
- ◆ Operation, EO business, etc. of 3 foreign and 8 Chinese EO-related companies;
- ◆ Operation, EO derivative business, etc. of 7 Chinese EO deep-processing enterprises.

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