



**China Polyether Monomer Industry Report,  
2019-2025**

**May 2019**

## **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

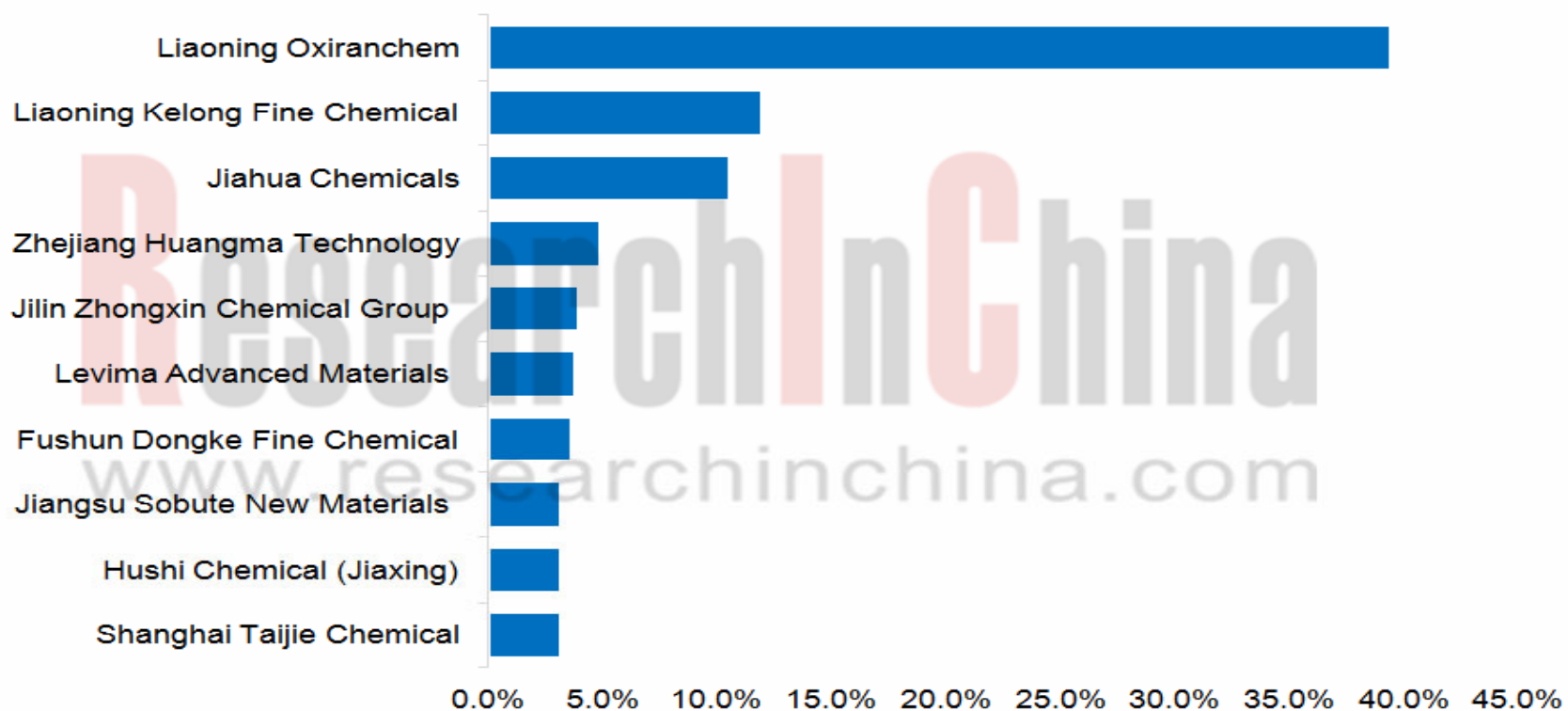
China has seen real estate boom and issued a raft of policies for continuous efforts in improving weak links in infrastructure sector over the years. Financial funds of RMB1,663.2 billion should be allocated to 26 provinces ahead of schedule, according to the six documents released successively by the Ministry of Finance of China on November 9, 2018. The country's infrastructure investment is expected to grow 10% in 2019, producing sizable demand for polycarboxylate superplasticizer, expectedly 1,100 tons or so in 2025 compared with roughly 670 tons in 2018.

Based on this, China's demand for polycarboxylate superplasticizer monomer sustained rapid growth. The country's demand for polycarboxylate superplasticizer polyether monomer was up by 8.0% year on year in 2018, and will present an AAGR of around 10% during 2019-2025; and over 96% of products are tresylated polyethylene glycol (TPEG) and isobutylene alcohol polyoxyethylene ether (HPEG) amid stricter requirements on technology and performance of products.

Price of polyether monomer is bound up with that of its core material ethylene oxide. In 2018, ethylene oxide price went through ups and downs in China, showing a choppy downtrend after the peak in September to a record low in recent years at the end of 2018. Prices of polyether monomer fluctuated accordingly: in 2018, the maximum price stood at RMB13,000/ton and the minimum price was RMB10,500/ton, a difference of 19%. Driven by infrastructure and real estate markets, the demand for polyether monomer will remain stable in China in 2019, with price probably undulating at a reasonable level.

As for enterprise pattern in China, polyether monomer producers cluster in the eastern region, leading to a high market concentration. The top ten players like Liaoning Oxiranchem, Liaoning Kelong Fine Chemical, Jiahua Chemicals, Zhejiang Huangma Technology and Shanghai Taijie Chemical, collectively account for 80% of the market by output. Among them, Liaoning Oxiranchem, the largest polyether monomer supplier with a complete industry chain from ethylene oxide to polyether monomer to superplasticizer, manufactured 565,000 tons of polyether monomer and seized a market share of 40% in 2018. The company has aggressively pushed on with upstream and downstream capacity expansion over the years to become more competitive. In June 2017, it bought a 66% stake in Sichuan Sedar Chemical Co., Ltd; in 2018, it integrated its capacity to improve polyether monomer production.

### Market Shares of Superplasticizer Polyether Monomer Producers in China, 2018



Source: ResearchInChina

China Polyether Monomer Industry Chain Report, 2019-2025 highlights the following:

- Polyether monomer industry in China (status quo, market supply & demand, regional structure, import & export, competitive landscape, prices, development trends, etc.);
- Markets for upstream raw materials (ethylene oxide, methanol, and acrylic acid) (supply & demand, competitive landscape, prices, etc.);
- Main downstream industries (polycarboxylate superplasticizer, surfactant) (market supply & demand, import & export, competitive landscape, prices, etc.);
- Nine major global and Chinese polyether monomer producers (operation, polyether monomer business, development prospects, etc.);
- Four Chinese polycarboxylate superplasticizer enterprises (operation, superplasticizer business, development prospects, etc.)

### **1 Overview of Polyether Monomer**

- 1.1 Classification and Application
- 1.2 Industry Chain

### **2. Development of Polyether Monomer in China**

- 2.1 Status Quo
- 2.2 Import & Export
- 2.3 Regional Structure
- 2.4 Competitive Landscape
- 2.5 Market Price
- 2.6 Development Trends

### **3 Influence of Upstream Sectors' Development on Polyether Monomer in China**

- 3.1 Ethylene Oxide (EO)
  - 3.1.1 Market Supply & Demand
  - 3.1.2 Competitive Landscape
  - 3.1.3 Market Price
- 3.2 Methanol
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  - 3.2.3 Major Enterprises
- 3.3 Acrylic Acid
  - 3.3.1 Market Demand
  - 3.3.2 Competitive Landscape
  - 3.3.3 Market Price
- 3.4 Enol

### **4 Influence of Downstream Sectors' Development on Polyether Monomer in China**

- 4.1 Polycarboxylate Superplasticizer
  - 4.1.1 Market Supply & Demand
  - 4.1.2 Competitive Landscape
  - 4.1.3 Market Price
- 4.2 Nonionic Surfactant
  - 4.2.1 Supply
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### **5 Major Foreign Polyether Monomer Companies**

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  - 5.1.1 Profile
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  - 5.1.4 Polyether Monomer Business
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- 5.2 Clariant
  - 5.2.1 Profile
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  - 5.2.4 Development in China
- 5.3 Lotte Chemical Corporation
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5.3.4 Business in China

### **6 Major Chinese Polyether Monomer Enterprises**

6.1 Liaoning Oxiranchem

6.1.1 Profile

6.1.2 Operation

6.1.3 R&D

6.1.4 Polyether Monomer Business

6.1.5 Development Strategy

6.2 Liaoning Kelong Fine Chemical

6.2.1 Profile

6.2.2 Operation

6.2.3 R&D

6.2.4 Polyether Monomer and Superplasticizer Business

6.3 Zhejiang Huangma Technology

6.3.1 Profile

6.3.2 Operation

6.3.3 Polyether Monomer Business

6.3.4 R&D

6.4 Shanghai Taijie Chemical

6.4.1 Profile

6.4.2 Polyether Monomer Business

6.5 Jiahua Chemicals

6.5.1 Profile

6.5.2 Operation

6.5.3 R&D

- 6.5.4 Polyether Monomer Business

6.6 Nanjing Well Chemical

6.6.1 Profile

6.6.2 Polyether Monomer Business

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7.1 Jiangsu Sobute New Materials

7.1.1 Profile

7.1.2 Superplasticizer Business

7.2 Xiamen Academy of Building Research Group

7.2.1 Profile

7.2.2 Operation

7.2.3 R&D

7.2.4 Superplasticizer Business

7.3 Shandong Huawei Yin Kai Building Materials

7.3.1 Profile

7.3.2 Operation

7.3.3 Superplasticizer Business

7.4 Shanxi Kaidi Building Materials

7.4.1 Profile

7.4.2 Superplasticizer Business

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