



**Global and China 1, 4-butanediol (BDO)
Industry Report, 2019-2025**

June 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

1,4-butanediol (BDO), an essential organic and fine chemical material, finds wide application in pharmaceuticals, chemicals, textile and household chemicals.

As of the end of 2018, the global BDO capacity reached approximately 4.3 million tons, of which about 53% came from Mainland China. World-renowned BDO manufacturers consist mainly of Taiwan-based Dairen Chemical Corporation (DCC), Germany-based BASF and U.S.-based LyondellBasell, the three of which hold a combined 38% of global capacity.

BDO capacities and technical expertise are largely controlled by BASF, U.S.-based ISP and Invista, U.K.-based Davy, Japan's Mitsubishi Chemical, and DCC. Although with small BDO capacity, Invista, Mitsubishi Chemical and Davy boasting core production technologies and patents play an important role in the global BDO industry by technology transfer or other means.

There are now about 19 BDO producers in China with the total BDO capacity approximating 2.3 million tons (including discontinued facilities) or more. Being subject to the market demand and environmental campaigns across the country, some manufacturers have to suspend BDO facilities and the real utilization rate of facilities is rather low.

The top three BDO manufacturers in Mainland China -- Markor Chem, Xinjiang Tianye and Sinopec Great Wall Energy & Chemical contribute 33.8% to China's total BDO capacity. Among them, Markor Chem has the largest capacity of 260,000 tons/a, and it has built 50,000 tons/a PTMEG with the chemical giant BASF. Markor Chem possesses a spandex industry chain.

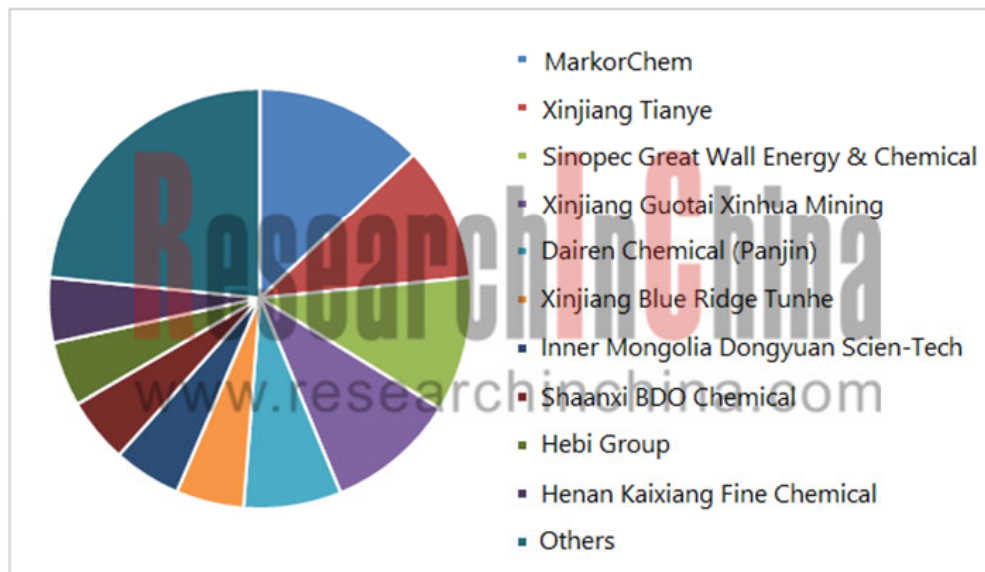
Affected by the environmental protection supervision of the central government, China's BDO demand growth rate has slowed down, reaching about 1.2 million tons in 2018, of which 50% was used for PTMEG and 32% for PBT. In the next few years, new or expanded capacity of BDO/PBT/PTMEG/GBL will continue to rise. China's BDO demand is expected to jump to 1.8 million tons in 2025.

Since 2018, Chinese BDO market has been declining, slumping by RMB3,300/ton from RMB11,800 / ton in 2018 to RMB8,500 / ton in March 2019 largely due to the worsening imbalance between supply and demand as well as the depressed demand from downstream areas. It is expected that the BDO price will continue to stay at the bottom for some time.

Global and China 1,4-Butanediol (BDO) Industry Report, 2019-2025 highlights the followings:

- Global BDO industry (supply and demand, competitive landscape, price trend, etc.);
- China BDO industry (supply and demand, competitive landscape, import & export, price trend and development trend);
- BDO downstream industries like PTMEG, PBT and GBL (supply and demand, competitive landscape, import and export, price trend, etc.);
- 13 global and Chinese BDO manufacturers (operation and BDO business) and progress of 16 Chinese Enterprises' BDO projects.

Market Share of Major Chinese BDO Manufacturers (by Capacity), 2018



Source: Global and China 1,4-Butanediol (BDO) Industry Report, 2019-2025 by ResearchInChina

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