

Market Research on MDI in China 2017-2022

<https://marketpublishers.com/r/M07FD3E59CAEN.html>

Date: April 2017

Pages: 70

Price: US\$ 3,500.00 (Single User License)

ID: M07FD3E59CAEN

Abstracts

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At present, core technology of MDI is mastered by only several manufacturers. As for supply and demand of MDI, the total capacity of MDI in the globe is nearly about 8 million tonnes per year. With the annual capacity of around 2 million tonnes, Wanhua Chemical Group ranks the first and takes 27%. The industry is occupied by several leading enterprises.

While in China, as for competition, in 2016, the capacity was over 3 million tonnes, in which Wanhua took nearly 60% with the capacity of nearly 2 million tonnes. From the aspect of production locations, except for the production bases of Wanhua in Yantai and BASF in Chongqing, other production bases are concentrated at the Yangtze River Delta. In 2016, about over 2 million tonnes MDI were produced, including around 670 thousand tonnes pure MDI and 1.6 million tonnes polymeric MDI. And the apparent consumption of MDI was over 2 million tonnes, including over 670 thousand tonnes pure MDI and over 1.3 million tonnes polymeric MDI. Generally speaking, the price of both pure MDI and polymeric MDI showed an increasing trend in 2016.

Pure MDI is mainly used in PU slurry and polymeric MDI is mainly used in refrigerators' freezer. In 2016, PU slurry takes largest proportion of pure MDI consumption, reached 35%, and refrigerators' freezer takes largest proportion of polymeric MDI consumption, reached over 50%.

At present, MDI market in China is monopolized by leading manufacturers and it is limited to increase the capacity. In 2020, the output is predicted to be about 3.3 million tonnes and the apparent consumption will be around 2.85 million tonnes.

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