

China Polyether Monomer (MPEG/APEG/TPEG) Industry Report, 2015-2018

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Abstracts

Polyether monomer in the Chinese market mainly refers to methoxy polyethylene glycol (MPEG), allyloxy polyethylene glycol (APEG), tresylated polyethylene glycol (TPEG) and isobutylene alcohol polyoxyethylene ether (HPEG). The field in which polyether monomer finds most application comes to polycarboxylate superplasticizer, whilst a small amount of polyether monomer gets used in daily chemical and pharmaceutical chemical additives and the like.

In the early development of Chinese polycarboxylate superplasticizer, polyether monomer was represented by MPEG and APEG. From 2009 onwards, the gradual localization of initiator materials reduces the prices of TPEG and HPEG significantly, so that TPEG and HPEG have become mainstream products on the polycarboxylate superplasticizer market. In 2014, TPEG and HPEG seized 95% share of the Chinese superplasticizer market in terms of application.

In the fast-growing Chinese polycarboxylate superplasticizer market, the growth in demand is mainly attributed to the jumping downstream demand and the substitution for the second-generation superplasticizer in recent years. In 2014, polycarboxylate superplasticizer has become a mainstream product in Chinese superplasticizer market, because it accounts for 67.1% of the total superplasticizer demand.

In 2007-2014, China's polycarboxylate superplasticizer sales volume presented a CAGR of 41.9%, hitting 4.801 million tons in 2014; the demand for polyether monomer approximated 750,000 tons. Driven by the development of China's economy and infrastructure construction, the demand for polycarboxylate superplasticizer is expected to maintain the growth rate of about 15% in the next few years, which will further propel the demand for polyether monomer.

As epoxy ethane, the main raw material of polyether monomer, cannot be transported over long distances, China's polyether monomer production is concentrated in main epoxy ethane producing areas, namely East China, Northeast China and North China (particularly East China where most manufacturing enterprises are located).

Large Chinese polyether monomer manufacturers - Liaoning Oxiranchem, Liaoning Kelong Fine Chemical, Zhejiang Huangma, Shanghai Taijie and Jiahua Chemical enjoyed a combined market share of over 60% (in the polycarboxylate superplasticizer market) in 2014. As the world's largest producer of high-performance concrete superplasticizer polyether, Liaoning Oxiranchem sold 210,000 tons of polyether monomer in 2014 and it is building the epoxy ethane derivative capacity of 127,000 tons.

In the polycarboxylate superplasticizer market, there are more than 1,000 manufacturers in China, but most of them are small enterprises focusing on compounding, whereas merely less than 20 ones of them master systematic and mature polycarboxylate superplasticizer concentrate and pumping agent synthesis technologies. In 2014, the top 9 Chinese polycarboxylate superplasticizer companies obtained the market share of 17.1%, especially Jiangsu Sobute and Xiamen Academy of Building Research Group witnessed the highest sales volume of 204,300 tons and 135,500 tons respectively.

China Polyether Monomer Industry Report, 2015-2018 by ResearchInChina contains the followings:

Status quo, market supply & demand, competition pattern, prospects, etc. of Chinese polyether monomer industry;

Supply & demand, competitive landscape and prices of upstream raw materials such as epoxy ethane, methanol, acrylic acid and the like;

Operation, polyether monomer business, prospects, etc. of 3 foreign polyether monomer companies and 6 Chinese counterparts;

Operation, superplasticizer business, prospects, etc. of 4 polycarboxylate superplasticizer companies in China.

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