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Global and China Acrylic Acid and Esters Industry Report, 2013-2016

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Abstracts

Acrylic acid & esters is the general term for acrylic acid (AA) and acrylic esters (AE), wherein, AE mainly refers to common acrylic esters (CAE), inclusive of methyl acrylate (MA), ethyl acrylate (EA), butyl acrylate (BA), ethyl hexyl acrylate (EHA), etc..

Impacted by the weak chemical industry and other factors, the global capacity of both crude acrylic acid (CAA) and common acrylic esters (CAE) presented a downward trend in 2013, with year-on-year growth rates up to 5.7% and 5.8%, which fell by 5.9 percentage points and 13.9 percentage points from 2012, respectively.

As the world's largest producer of AA & AE, China contributed 30.8% (1,932 kt/a) and 32.3% (1,950 kt/a) to the global CAA and CAE capacity respectively in 2013. It is expected that by the end of 2016, its CAA and CAE capacities are expected to reach 3,520 kt/a and 3,730 kt/a, separately.

Super absorbent polymer (SAP), paint and adhesive are major downstream markets for AA & AE in China. In 2013, 68% of China's aggregate demand for AA & AE came from them.

The report mainly covers the followings:

Supply & demand, competitive landscape, geographical distribution, etc. of the global AA & AE industry;

Supply & demand, import & export, competition pattern, prices, etc. of Chinese AA & AE industry;

Development of propylene, SAP, paint and adhesives;

Operation and development in China of four global AA & AE enterprises such as BASF, Dow Chemical and Arkema;

Operation and development strategies of eight Chinese AA & AE enterprises including SunVic Chemical Holdings Limited, Shanghai Huayi Acrylic Acid Co., Ltd. and Zhejiang Satellite Petrochemical Co., Ltd.

BASF: The largest AA & AE manufacturer in the world contributed 19.0% and 20.8% of the global CAA and CAE capacity respectively in 2013. In May 2014, BASF's new 160 kt/a Acrylic Acid Project in Nanjing, China went into operation. Meanwhile, it is working on the 160 kt/a Acrylic Acid Project (scheduled to be put into operation at the end of 2014) in Brazil. By the end of 2014, BASF’s acrylic acid capacity is expected to attain 1,510 kt/a.

Arkema: As the world's third-largest AA & AE manufacturer, Arkema in 2014 announced that it would cooperate with the Chinese acrylic acid giant – SunVic Chemical to establish a joint venture dubbed Sunke (controlled by Arkema), which was to take over SunVic Chemical's acrylic acid production base in Taixing. The third 160 kt/a acrylic acid production line of Taixing Base is scheduled to go into operation in the first quarter of 2015, by then Arkema will boast acrylic acid capacity of 320 kt/a in China.

SunVic Chemical: The largest AA & AE manufacturer in China shared 27.2% and 17.9% of China’s CAA and CAE capacity respectively in 2013.

Shanghai Huayi Acrylic Acid: The second largest CAA & CAE manufacturer in China, with CAA & CAE capacities amounting to 210 kt/a and 265 kt/a in 2013, respectively. In 2014, the company is actively promoting its 320,000 tons/a AA & AE Project (located in Shanghai Chemical Industry Zone) which is implemented by two phases, of which, the Phase I Project (including 160 kt/a AA device, 160 kt/a BA, 84 kt/a GAA and 33.3 kt/a SAP) was commenced at the end of October 2013 and would go into operation in 2015 as planned.

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