

# Global and China Industrial Gases Industry Report, 2012-2013

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## Abstracts

The report highlights the followings:

Global Industrial Gas Market

China Industrial Gas Market

Global and China Industrial Gas Industry

12 Industrial Gas Companies

Industrial gases mainly refer to oxygen, nitrogen, argon, acetylene, carbon dioxide, hydrogen, and carbon monoxide. In 2012, the market size of industrial gases worldwide approximated USD69.8 billion, of which, it was exclusive of the gases generated by large enterprises themselves. The downstream customers of industrial gases concentrate in chemical, refining, iron & steel, welding, glass, electronics, healthcare and food industries, with the combined share of the first three surpassing 50% and keeping stable.

In 2012, the market size of global industrial gas industry increased by 4.6% year-on-year, with the growth rate down somewhat against that in 2011. The reduction mainly came as the decreased output in China iron & steel industry because of massive loss-making. Since 2013, due to the reviving real estate market, China has witnessed robust recovery in economy, especially in iron & steel and heavy chemical sectors. In the meantime, the North American region has accelerated its development of shale gas, encouraging a good many of chemical enterprises to establish new plants in America

given the consideration of low-priced natural gas. North America and China are expected to become the key engines for the development of industrial gas. And the estimation shows that the global industrial gas market scale in 2013 will surge by 6.9% year-on-year to USD74.6 billion.

In the developed Euro-Americas, there are 80% outsourcing businesses or plants, and the rest 20% are Captive. But it is not true in China, where 53% businesses or plants in 2012 were still Captive, while only 47% were outsourcing ones. It indicates that China bears a huge potential in the sector. In 2012, the industrial gas market scale in China was around USD7.98 billion, with the targeted figure in 2013 reaching USD8.63 billion. In China, iron & steel, coal chemical and refining industries are engines of the industrial gas market. And more and more iron & steel companies are expected to outsource their industrial gas business.

In June, 2011, the Chinese Government ordered to suspend coal chemical industry, forcing China to increase its dependence on the import of petroleum, natural gas and olefin. Given this, the central government called for retrieving the operation of coal chemical projects which are expected to fuel the growth of industrial gas market from Mar.2013. As of Mar. 2013, some 10 coal chemical projects had been approved out of the 104 ones in 2012 application.

In recent years, China has been frequently engulfed by haze, contributing in part to the substandard auto gas in purity. Thus, the Chinese government has to respond with hefty investment in this regard. In China, either imported or homemade crude oil is high sulfur crude oil, and H<sub>2</sub> Deoxo is the only solution to reduce the sulfur content. At present, large coastal refining plants are basically equipped with the capability to produce national-standard 90 and V gasoline, while their counterparts in landlocked regions fall behind. Large refining plants under Sinopec are competitive in producing national-standard 90 and V gasoline, with the capacity making up 64% of the total compared to the 23% mark of CNPC. With China's advance in producing qualified refined oil products, refineries in inland regions such as Northwest China are also pressing ahead to prepare for hydrogenation units, laying foundation for the nationwide replacement for IV gasoline. It is no doubt a huge potential for businesses specializing in hydrogen production such as APCI.

The industrial gas industry witnessed critical disparity, with the top 4 industrial players dominating 78% market share, while a proximate number of 10,000 businesses only occupying 20%. The reason attributes to the fact that the gas transportation is not easy, the demand of many small-sized industrial players is quite limited, coupled that large

businesses are reluctant to provide industrial gases for these small ones. In China, small-scaled industrial gas producers amount to as many as 3,000. In recent years, a few industrial gas companies tried their luck to find a high-speed development path, represented by Yingde Gases (listed in HK) whose revenue in 2012 soared to nearly RMB5 billion from RMB1.4 billion in 2008, with the expected figure in 2013 surpassing RMB6 billion. Another case in point was China Gas Industry Investment Holdings which was seeking for listing.

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