

# Global and China MO Source Industry Report, 2014-2018

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## Abstracts

As the backing material of MOCVD, MOMBE and other semiconductor microstructures, MO source (also known as high-purity metal organic compound) is widely used in LED (accounting for about 90% of the demand), solar cells, phase change memory, radio-frequency integrated circuit (RFIC) chips, etc.

The global demand for MO source was small prior to 2009, with a basic balance between market supply and demand. In 2009-2011, the explosive growth in the LED industry propelled the demand for MO source to grow swiftly, resulting in the global oligopoly and the gap of about 4.8 tons in 2011. After 2012, the slowdown of the LED market and new capacity release of major companies led to the oversupply worldwide.

China is one of the world's major MO source producers and consumers. In 2014, China's MO source capacity hit 28.5 tons, making up about 30% of the global total; it is expected to jump to 33.6 tons in 2015. China's demand for MO source attained 23.5 tons in 2014, occupying around 40.4% of the global; driven by the continued growth in MOCVD shipment, the demand is expected to reach 32.7 tons in 2015.

Currently, the global MO source market is dominated by several tycoons. In 2014, DOW, SAFC, Nata Opto-electronic and AKZO Nobel eyed a combined market share of about 92.2% (by sales); particularly DOW grasped 37.8% alone. Japan-based Sumitomo Chemical, South Korea-based Lake LED Materials and China-based Suzhou Guangyao have formed sizable production of MO source, but their capacity is not high enough, so they are still weak in the global competition.

DOW is the largest MO source manufacturer in the world. It entered the Chinese market as early as 1930s, and now China has become its second-largest overseas market

following Germany with the sales contribution of RMB4.3 billion in 2014. To serve the Greater China region better, DOW set up a sales base in Chengdu in 2012; it erected sales bases in Harbin and Wuhan in 2014; in 2015, it plans to establish a sales base in Xinjiang (according to China's 'The Belt and Road Initiative' strategic layout).

Jiangsu Nata Opto-electronic Material Co., Ltd. is China's largest MO source company with an existing capacity of 27.5 t/a. In May 2014, the company invested RMB28.41 million in a new 1.5 t/a high-purity trimethyl indium production line project, consisting of a trimethyl indium synthetic line and two trimethyl indium purification lines.

The report focuses on the followings:

Global MO source supply, demand, competition pattern, etc.;

China's MO source development environment, supply, demand, price, etc.;

Status quo of Chinese MO source upstream and downstream industries;

Operation, revenue structure, MO source business, etc. of eight MO companies at home and abroad.

## Contents

### **1 OVERVIEW OF MO SOURCE INDUSTRY**

- 1.1 Introduction
- 1.2 Classification and Application
- 1.3 Industry Chain
- 1.4 Industry Characteristics
  - 1.4.1 High Concentration
  - 1.4.2 High Growth

### **2 DEVELOPMENT OF GLOBAL MO SOURCE INDUSTRY**

- 2.1 Overview
- 2.2 Supply
- 2.3 Demand
  - 2.3.1 Downstream Demand Restores Growth
  - 2.3.2 Midstream & Upstream Capacity Gradually Digested
  - 2.3.3 Quantity Demanded
  - 2.3.4 Demand Structure
- 2.4 Competition Pattern
- 2.5 USA
- 2.6 Taiwan
- 2.7 South Korea
- 2.8 Europe
- 2.9 Japan

### **3 DEVELOPMENT OF MO SOURCE INDUSTRY IN CHINA**

- 3.1 Development Environment
  - 3.1.1 Policy Environment
  - 3.1.2 Trade Environment
  - 3.1.3 Technical Environment
- 3.2 Supply
  - 3.2.1 Production Capacity
  - 3.2.2 Capacity Structure
- 3.3 Demand
- 3.4 Price Trend

## **4 UPSTREAM AND DOWNSTREAM SECTORS OF MO SOURCE IN CHINA**

### 4.1 Upstream Sectors

- 4.1.1 Gallium
- 4.1.2 Indium
- 4.1.3 Policies and the Influence

### 4.2 LED Industry

- 4.2.1 LED Market Scale
- 4.2.2 MOCVD and LED Chip Market
- 4.2.3 LED Encapsulation Market
- 4.2.4 LED Application Market
- 4.2.5 Competition Pattern

### 4.3 Other Downstream Sectors

- 4.3.1 New Solar Cell
- 4.3.2 Phase Change Memory
- 4.3.3 Semiconductor Laser
- 4.3.4 RFIC Chip

## **5 KEY ENTERPRISES WORLDWIDE**

### 5.1 DOW

- 5.1.1 Profile
- 5.1.2 Operation
- 5.1.3 Revenue Structure
- 5.1.4 MO Source Business
- 5.1.5 Business in China

### 5.2 Sigma-Aldrich

- 5.2.1 Profile
- 5.2.2 Operation
- 5.2.3 SAFC Hitech-MO Source Business
- 5.2.4 Business in China

### 5.3 AKZO Nobel

- 5.3.1 Profile
- 5.3.2 Operation
- 5.3.3 Revenue Structure
- 5.3.4 MO Source Business
- 5.3.5 Business in China

### 5.4 Sumitomo Chemical

- 5.4.1 Profile

- 5.4.2 Operation
- 5.4.3 Revenue Structure
- 5.4.4 MO Source Business
- 5.4.5 Business in China
- 5.5 Albemarle
  - 5.5.1 Profile
  - 5.5.2 Operation
  - 5.5.3 Revenue Structure
  - 5.5.4 MO Source Business
  - 5.5.5 Business in China
- 5.6 Chemtura
  - 5.6.1 Profile
  - 5.6.2 Operation
  - 5.6.3 Revenue Structure
  - 5.6.4 MO Source Business
  - 5.6.5 Business in China
- 5.7 Lake LED Materials
  - 5.7.1 Profile
  - 5.7.2 MO Source Business
- 5.8 Nata Opto-electronic
  - 5.8.1 Profile
  - 5.8.2 Operation
  - 5.8.3 Revenue Structure
  - 5.8.4 Gross Margin
  - 5.8.5 Production and Sales
  - 5.8.6 Key Projects

## **6 SUMMARY AND FORECAST**

- 6.1 Market
- 6.2 Enterprises

## Selected Charts

### SELECTED CHARTS

Application of MO Source  
Industrial Chain of MO Source  
Proportion of MO Source in LED Production Process  
Global MO Source Supply, 2010-2015  
Global LED Backlight Penetration Rate by Field, 2008-2015  
Global TV LED Backlight Output Value, 2012-2015  
Output Value and Growth Rate of Global HB LED Products, 2010-2015  
Number of Newly Added MOCVD Machines and Ownership Worldwide, 2010-2018E  
Global MOCVD Ownership by Region, 2014  
Demand of MOCVD Standalone for MO Source  
Global MO Source Demand, 2010-2018E  
Global MO Source Demand by Industry, 2010-2015  
Global MO Source Capacity by Region, 2015  
Number of Newly Added MOCVD Machines in Taiwan, 2009-2015  
Number of Newly Added MOCVD Machines in South Korea, 2009-2012  
Production Bases and Major Customers of MO Source in Japan  
Distribution of Japanese LED Industry  
Policies about MO Source Industry in China, 2011-2014  
Capacity of MO Source in China, 2010-2015  
Capacity of MO Source in China by Product, 2010-2015  
Competition Pattern of Chinese MO Source Companies, 2014  
Major M&A Cases in LED Industry, 2014  
MOCVD Purchase Plan of China's Local Governments, 2010-2015  
Demand for MO Source in China, 2010-2018E  
Average Price of MO Source Products in China, 2009-2015  
Price of Gallium (Purity ?99.99%) in China, 2010-2015  
Global indium consumption structure, 2014  
Output and Sales Volume of Indium in China, 2009-2014  
Market Price of Indium (Purity ?99.99%) in China, 2010-2015  
LED Industry Chain  
Driving Factors of LED Industry, 2005-2014  
Total Output Value and Growth Rate of LED Industry in China, 2010-2015  
Ownership and Growth Rate of MOCVD Machines in China, 2010-2018E  
MOCVD Capacity Utilization and Operating Rate in China, 2012-2014  
Output Value and Growth Rate of LED Epitaxial Chip in China, 2010-2015

Major LED Epitaxial Chip Companies in China  
Output Value and Growth Rate of LED Encapsulation Industry in China, 2010-2015  
LED Output Value by Application, 2013-2014  
Business of Key LED Companies in China  
Performance Comparison of Different Types of Solar Cells  
Output of GaAs Solar Cell in China, 2010/2015/2020  
Sales and Net Income of Dow, 2010-2015  
Revenue Structure of Dow by Business, 2014  
Production Bases of Dow Electronic Materials  
Revenue of Electronic & Functional Materials of Dow, 2010-2014  
Revenue of Dow's Electronic Materials Division by Region, 2014  
Revenue of Dow's Electronic Materials Division by Business, 2014  
Sales and Net Income of Sigma-Aldrich, 2009-2015  
Revenue Structure of Sigma-Aldrich by Business, 2011-2014  
Revenue Structure of Sigma-Aldrich by Region, 2014  
Sales and Growth Rate of SAF, 2011-2015  
MO Source Production Bases of SAF Hitech  
Revenue and Net Income of AKZO Nobel, 2009-2015  
Revenue Structure of AKZO Nobel by Business, 2012-2015  
Revenue Structure of AKZO Nobel by Region, 2014  
Revenue of AKZO Nobel's Functional Chemicals, 2012-2014  
Revenue Structure of AKZO Nobel's Functional Chemicals by Region, 2014  
Revenue and Growth Rate of AKZO Nobel in China, 2010-2015  
Production Bases of Functional Chemical Products of AKZO Nobel in China  
Revenue and Net Income of Sumitomo Chemical, FY2009- FY2014  
Revenue of Sumitomo Chemical by Business, FY2009-FY2014  
Branch Companies of Sumitomo Chemical and Their Primary Business  
Albemarle's Global Layout  
Revenue and Net Income of Albemarle, 2010-2015  
Revenue of Albemarle by Business, 2009-2014  
Albemarle's Layout in China  
Chemtura's Global Layout  
Sales and Net Income of Chemtura, 2009-2014  
Revenue of Chemtura by Business, 2014  
Revenue Structure of Chemtura by Region, 2014  
Main MO Source Products of Lake LED Materials  
Equity Structure of Nata Opto-electronic, 2015  
Revenue and Net Income of Nata Opto-electronic, 2009-2015  
Revenue of Nata Opto-electronic by Product, 2009-2014

Revenue of Nata Opto-electronic by Region, 2009-2014  
Gross Margin of Nata Opto-electronic by Product, 2009-2014  
Sales Volume and Unit Price of Nata Opto-electronic, 2010-2014  
Key Projects of Nata Opto-electronic, 2014  
Capacity of Nata Opto-electronic, 2010-2015  
Global and Chinese MO Source Demand Growth Rate, 2010-2018E  
Growth Rate of LED Chip and Encapsulation Output Value in China, 2010-2015  
Revenue Growth Rate of Major Global MO Source Companies, 2010-2015  
Competition Pattern of Global MO Source Companies, 2014



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