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Global and China MO Source Industry Report, 2014-2018

https://marketpublishers.com/r/GFE389FC387EN.html
Date: July 2015
Pages: 72
Price: US$ 1,700.00 (Single User License)
ID: GFE389FC387EN

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.

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