

Global and China Superabsorbent Polymers (SAP) Industry Report, 2014-2018

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Abstracts

Superabsorbent polymers (SAPs) (also called super absorbent) are a new high polymer material that has high absorption capacity and swelling capacity. A SAP may absorb hundreds of or even one thousand times its weight. It is mainly used in personal disposable hygiene products, such as baby diapers, adult incontinence products, and feminine hygiene products.

In 2014, the global SAP capacity came to 3.119 million tons, up 11.8% from a year earlier, which was mainly distributed in China, Japan, the United States, Germany, and other countries and regions. Over the same year, China overtook Japan as the world's largest country in SAP capacity, accounting for 27.2% of the global total.

Propelled by the growth in global demand for hygiene products, the global SAP consumption totaled 2,130 kt in 2014, up 7.14% year on year. Among them, China consumed 315 kt, up 18.0% from the previous year, a rise that was far higher than the global average. In future, driven by the factors including the implementation of the 'Selective Two-child' Policy and the increase of ageing population, China's SAP consumption will further expand, with an estimated CAGR of some 20% during 2015-2018.

At present, the global SAP manufacturers represent a high concentration, with more than 80% of SAP capacity in the hands of top 6 enterprises—EVONIK Industries, Nippon Shokubai, BASF, Sumitomo Seika Chemicals, SDP Global, and Yixing Danson Technology. Moreover, all major enterprises are still stepping up layout, continuously expanding projects and increasing market share.

EVONIK Industries, the world's biggest SAP producer, achieved an annual capacity of

570 kt of SAP through the end of 2014. In 2014, the company's third largest SAP plant—Saudi Arabia SAP Plant was put into operation, which would increase a further 80 kt/a SAP.

As the world's second largest SAP manufacturer, Nippon Shokubai began in October 2014 to expand its SAP capacity in Himeji plant to 370 kt/a; in May 2015, the company invested an extra EUR350 million in the expansion of acrylic acid and SAP capacity in Belgium, a move that helped increase an additional 100 kt/a SAP.

Sumitomo Seika Chemicals, one of the major SAP manufactures worldwide, has factories in Japan, France and Singapore. In August 2014, the company co-funded a 59 kt/a SAP plant in Yeosu. South Korea. The joint venture is to be put into operation in May 2016. In May 2015, Japans Himeji plant went into operation. By the end of 2016, the company's total SAP capacity will be very likely to reach 385 kt/a.

Yixing Denson Technology, the largest SAP producer in China, boasted a capacity of 260 kt/a SAP by the end of 2014. In 2015, the company has four 40 kt/a production lines under construction, which are to be put into operation at the year end. At that time, the company will have 11 SAP production lines, with a total capacity of 420 kt/a.

Global and China Superabsorbent Polymers (SAP) Industry Report, 2014-2018 mainly focuses on the following:

- Supply and demand, regional structure, and competitive landscape of the global SAP market;

- Supply and demand, regional structure, and competitive landscape of China's SAP market;

- Supply and demand and development trend of acrylic acid in China;

- Market size, SAP demand, and development trend of China's major SAP downstream sectors including baby diapers, adult incontinence products, and feminine hygiene products;

- Operation and development in China of 5 global SAP companies;

- Operation and development strategy of 11 key Chinese SAP companies;

Prediction of development trend in global and China SAP market, 2015-2018.

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