Global and China 1,4-Butanediol (BDO) Industry Report, 2014-2017

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Abstracts

As an important organic and fine chemical, 1,4-butanediol (BDO) is widely used in pharmaceutical, chemical, textile and household chemical fields.

By the end of September 2014, the BDO capacity worldwide topped around 3.35 million tons, of which about 48% came from Mainland China. Global BDO manufacturers mainly include Taiwan-based Dairen Chemical Corporation (DCC), Germany-based BASF and U.S.-based LyondellBasell, combining 38.5% of total worldwide capacity.

The BDO production process on a global scale is dominated by BASF, U.S.-based ISP and Invista, U.K.-based Davy, Japan's Mitsubishi Chemical, and DCC. In spite of relatively small BDO capacity, Invista, Mitsubishi Chemical and Davy with core production technologies and patents are playing an important role in the global BDO industry by technology transfer or other means.

During 2009-2011, the BDO industry in China faced a tight supply, the rising BDO price drove a large number of enterprises to add or expand capacity projects, which gave rise to the BDO capacity swelling. By the end of September 2014, China's BDO capacity has been around 1.616 million tons, while the severe overcapacity was accompanied by an operating rate (regarding to BDO facilities) of merely 30% or so.

At present, the BDO in Mainland China is mostly manufactured via reppe process and maleic anhydride process, of which maleic anhydride-process BDO makes up roughly 27.5% of capacity. From 2012 onward, due to the stubbornly high price of maleic anhydride, maleic anhydride-process BDO facilities were in the red, basically shut down. While reppe-process BDO facilities are in relatively steady operation, but the profit margin thereof has been sharply reduced.

In the next few years, more new BDO capacities were to be built in Mainland China as it is planned, totaling 1.4 million tons or so, however, against the excess capacity and the sluggish market demand, some projects will probably be put aside or cancelled, and the growth rate of BDO capacity will slacken. In the meantime, the concentration of China's BDO industry is expected to increase step by step. Mainstream manufacturers such as Markor Chem and Shanxi Sanwei will continue to expand their BDO capacities and the BDO facilities of some small producers will be gradually eliminated under cost pressure.

Up to the end of September 2014, the top 3 BDO manufacturers in Mainland China were Markor Chem, Shanxi Sanwei and Chang Chun Dairen Chemical (PANJIN), respectively featuring capacity of 160,000 tons, 150,000 tons and 150,000 tons.

Global and China 1,4-Butanediol (BDO) Industry Report, 2014-2017 by ResearchInChina mainly highlights the followings:

Supply & demand, competitive landscape, price trend, etc. of global BDO industry;

Supply & demand, competitive landscape, import & export, price trend and development forecast (2014-2017) of the BDO industry in China;

Supply & demand, competitive landscape, import & export, price trend, etc. of BDO downstream industries such as PTMEG, PBT, GBL, etc. at home and abroad;

Operation and BDO business of 13 BDO manufacturers in the world and China and progress of BDO projects of 16 Chinese enterprises.

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