

Global and China Epoxy Resin Industry Report, 2013-2016

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Abstracts

Epoxy resin is a macro molecular compound containing two or more epoxy groups, mainly used in paint, electronics, composite materials and other fields.

In 2012, the global output of epoxy resin (bisphenol A epoxy resin accounted for about 80% -95%) hit about 2.41 million tons, above 90% of which was contributed by Asia, Western Europe and the United States. In recent years, the epoxy resin market in Europe and the United States has tended to be saturated, while the new capacities have been mainly concentrated in the Asian regions, particularly in China.

China is currently the world's largest producer of epoxy resin, sharing approximately 37.1% of the global output. In 2012, the sluggish Chinese epoxy resin market was featured with surplus low-end products, insufficient supply of high-end products and low operating rate (45.9%) of epoxy resin plants. In the next few years, China will improve the capacity of high-end epoxy resin, so as to reduce its dependence on imports.

The global epoxy resin industry is highly concentrated. In 2012, the combined capacity of top five manufacturers including Nan Ya Plastics, Dow Chemical, Momentive, Huntsman and Jiangsu Sanmu Group accounted for 53.1% of the global capacity.

In Mainland China, a few epoxy resin producers enjoy absolute superiority in scale, and the industry concentration degree is lower than that in Europe and America. In 2012, top five epoxy resin manufacturers in Chinese Mainland contributed to 41.8% of China's total capacity together. By capacity, the first three positions were occupied by Nan Ya Epoxy Resin (Kunshan), Jiangsu Sanmu Group and Baling Petrochemical with 316,000 tons, 200,000 tons and 125,000 tons respectively.

Epoxy resin is made from epichlorohydrin and bisphenol A. In 2012, Chinese epichlorohydrin market was basically dominated by local manufacturers with the self-sufficiency rate of 93.9%; the top three enterprises by capacity were Shandong Haili Chemical Industry, Yihai Kerry and Shandong Xinyue Chemical. However, Bisphenol A relies on imports, and the self-sufficiency rate was only 39.0%; Bayer Polymers Shanghai, Sinopec Mitsubishi Chemical Polycarbonate (Beijing) and Shanghai Sinopec Mitsui Chemicals ranked the top three in terms of bisphenol A capacity.

The report consists of the followings:

Market size, competition pattern and development trends of the global epoxy resin industry;

Policies, supply and demand, competition pattern, import and export, price trends and development outlook of China epoxy resin industry;

Supply and demand, competition pattern, import and export and price trend of the upstream epichlorohydrin market;

Supply and demand, competition pattern, import and export and price trend of the upstream bisphenol A market;

The demand of downstream paint, electrical and electronic, composite materials and other industries for epoxy resin and development forecast;

Operation, epoxy resin business and prospects of 17 global and Chinese epoxy resin manufacturers.

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