

Research Report of Chinese Plasticizer Industry, 2008-2009

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Abstracts

Plasticizer is the largest auxiliary variety in modern plastics industry and enjoys most demands in PVC products, accounting for 60% of the total yields of the plastic auxiliaries. Plasticizers are mainly applied in wires, cables, floorboards, wallpaper, automobile and packaging, which have huge market capacity.

Chinese plasticizer industry has formed certain scale with decades of years of development. At present, China is the largest producer and consumer of the plasticizer in Asia. China has more than ten plasticizer manufacturers in ten thousand grades, which are all engaged in the production of normal varieties, such as DOP, DBP, etc, fewer yields of the special plasticizer varieties and account for small market shares. Chinese local enterprises lack competitive advantages compared with the foreign-funded plasticizer manufacturers.

Owing to the multiple unfavorable influences (the continuous increases of the prices of the raw materials, the limitation of the environmental protection policies, the newly built and extended production installations, the reduction of the export tax rebate and the continuous up-valuation of Chinese currency), demands for DOP on Chinese market shrank in 2007 to 2008 and the operation rate of most domestic production installations was low. With the influences of international financial crisis, it is predicted that the general situation of Chinese plasticizer market will not make significant improvement in 2009.

From the aspect of the supply situations of the plasticizer raw materials, the phthalic anhydride was sufficient in supplies on Chinese domestic market, the yield capacity was expanded gradually and the prices went steady in 2008; the yield capacity of the octanol on Chinese market was obviously insufficient, monopolized by large petrochemical

enterprises. At present, the octanol is in smooth sale in Chinese market and the price intends to increase; compared with octanol, the isobutyl alcohol was sufficient in supplies and the price was comparatively steady in 2007, but the price was cut down sharply because of the reduction in the demands of the downstream.

In 2008 and 2009, the total yield capacity of PVC in China would still keep fast growth, in which the national newly added yield capacity was about 2.5 million tons in 2008, having shown the trend of the supplies exceeding the demands. In the future, the exports of the PVC products will be increased inevitably. In 2007, the export tax rebate policies were adjusted. In addition, the anti-dumping measures cut down the profits of the PVC enterprises, resulting in the strikes on the upstream industries.

For the production, major plasticizer was likely to be produced successively on large scale, but the special plasticizer tended to be produced in more varieties, small quantities and at intervals. For the products, the traditional, cheap and high risky phthalate plasticizer is being substituted by the new, safe and expensive citrate plasticizer and trimellitic acid plasticizer, which reflects significantly in the international market. Due to the price element, the phthalate plasticizer will still be used in large amount in China.

Chinese plasticizer industry will remain in depression in 2009 and 2010. However, from the part of the development and the market demands, there will be a better turn sooner or later. Under the influences of international financial crisis, many weak and small enterprises will be knocked out of the market, but the powerful enterprises will be able to withstand the market risks, which have a promising prospect.

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