

Research Report on Chinese Chlor-alkali Industry in 2009

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Abstracts

The market situation of Chinese Chlor-alkali industry changed greatly in 2008. Affected by the financial crisis and the industrial cycle, the Chlor-alkali enterprises went through a tendency from making profits to making deficits. While 2009 is still a tough year.

It is estimated that by the end of 2008, the productivity of Chinese PVC had reached 15.81 million tons, rising by 9.2% over 2007(14.48 tons). The productivity of Chinese Chlor-alkali had reached 24.72 tons, rising by 13.3% compared over 2007 (21.81 tons). The growth rate was much lower than several years ago.

In 2008, the market price of products in Chinese Chlor-alkali industry went up and down like roller coasters. The highest price of PVC was about 9,000 RMB per ton and the lowest price was 5,000 RMB per ton. While the highest price of the liquid caustic soda (converted into 100%) was 2,800 RMB per ton and the lowest price was 2,000 RMB per ton. The violent fluctuation of price of products had hindered the formulation of production and sales plans by enterprises.

Affected by the appreciation of RMB and anti-dumping movements abroad in 2008, it became difficult to export and sell Chinese Chlor-alkali products, especially PVC products. Since the third quarter of 2008, the costs of foreign products has reduced greatly as the global crude oil price fell back. The cost advantages of Chinese Chlor-alkali products disappeared gradually and the export volumes fell sharply.

In 2008, South China went through a wide range of rain and snow and the supplies of power and railway transportation were cut down in some areas. This caused a heavy damage to the production and transportation of chlor-alkali products. In May, the earthquake in Sichuan stopped the production activities of many chlor-alkali enterprises

in this area, bringing about gigantic economic losses to the manufacturers directly and indirectly. According to statistics, the outputs of Chinese PVC were 8.817 million tons in 2008, decreasing by 9.25% over the last year (9.72 million tons). The outputs of sodium hydroxide were 18.521 million tons, rising by 5.27% compared with the outputs in last year (17.593 tons). Because the growth rate of the productivity was much higher than that of outputs, the overall rate of operation of chlor-alkali devices was low.

After the third quarter of 2008, affected by the continuously low demands in the lower course, the stocks of manufacturers increased and the selling price went down greatly. They suffered great losses. More and more manufacturing devices were stopped using and those working devices had much less loads. The overall rate of operation of PVC was only 30% to 40% and the rate of operation of sodium hydroxide was 50% to 60%.

In 2009, Chinese chlor-alkali market will still have to face the harsh tests and there will be many variables in the process of the development of the industry.

In 2009, Chinese chlor-alkali industry doesn't stop its step of expanding the production though there is financial crisis. According the statistics of China chlor-alkali online, in 2009, the predicted productivity of invested PVC is 3.33 million tons and sodium hydroxide 4.95 million tons. According to 2008, with the decrease of demands, the rate of operation of devices was badly insufficient. Especially the rate of operation of PVC devices was below 60%. Therefore, in 2009, with the increase of the productivity, the rate of operation of devices will continue to fall down.

According to the outputs of 2008, the outputs of PVC were less than 2007 and the growth rate of the outputs of sodium hydroxide was much lower than previous years. It is estimated that in 2009 the outputs of Chinese PVC will increase greatly compared with 2008. But the growth rate of the outputs of sodium hydroxide will continue to slow down.

In 2008, the price of Chinese chlor-alkali products, especially the price of PVC, fluctuated greatly. This resulted in some losses to those enterprises. It is estimated that it will be difficult for the price of Chinese chlor-alkali market to change sharply in 2009. The manufacturers will control their outputs properly according to the demands. And the supply and demand of the market will be balanced on the whole.

With the decrease of the global crude oil price, the costs of foreign ethylene PVC has been cut down and the quantities of resources that enter Chinese market will

continuously increase. It is estimated that the export volumes of Chinese sodium hydroxide will increase. And as some devices for sodium hydroxide abroad have been shut down, the demand for Chinese sodium hydroxide will increase, which is certainly an opportunity for Chinese sodium hydroxide manufacturers.

Because the expanding speed of the productivity of Chinese chlor-alkali enterprises was so fast in the last few years, the supply of the products has exceeded demand and the industry has entered the period of integration. With the increase of producing costs of enterprises and the decrease of sales prices, the level of making profits has fallen down rapidly. Especially in the third quarter of 2008, affected by the global financial crisis, most of the enterprises suffered great losses. It will be difficult to improve the situation in 2009, and the chlor-alkali industry will also enter the period of integration.

Affected by the financial crisis, those small enterprises with short resources, low-end technologies, small scales and severe pollutions will gradually lose their competitive strengths under the pressure of environmental protection and costs. Those leading chlor-alkali enterprises which have rich raw materials such as coal, salt, coke, and calcium carbide and own scaled and complete cycling process routes, will become the pacemakers of the industry in the financial crisis.

Affected by the crisis, the competition of costs among enterprises will become fiercer. But as Chinese government has begun to make policies which are in favor of Central China and the West, some chlor-alkali projects in these areas will be developed well. For example, because it is far from the consuming markets and has high transportation costs, Xinjiang will choose the strategy of developing the industry of deep processing and using of coal, reducing the transportation volumes of products and increasing the additional values of products. Meantime, compared with some areas with severe water shortage, Xinjiang has a comparatively rich water resource and will promote the development of the coal chemical industry, especially the chlor-alkali chemical industry. In China's current economic situation, the development of the chlor-alkali chemical industry in similar areas will have a good opportunity.

Under the circumstances of the global financial crisis, Chinese government will publish a series of policies to promote domestic demand and converse the deficit situation of industrial enterprises. Besides, the government will also publish some favored polices in export rebates, which is a good news to the chlor-alkali industry.

In general, there are opportunities and challenges for Chinese chlor-alkali industry in the market of 2009. From the normal market cycle, the industry will enter the period of

integration and the financial crisis will speed up this process.

By reading this report, readers can acquire the following information:

- Categories of Chinese chlor-alkali industry
- The variation tendency of the productivity of Chinese chlor-alkali industry
- The status of export and import of Chinese chlor-alkali industry
- The variation tendency of the outputs of Chinese chlor-alkali industry
- The main enterprises in Chinese chlor-alkali industry and their operational status
- Effects of the global financial crisis on Chinese chlor-alkali industry
- The affecting factors on the development of Chinese chlor-alkali industry
- Predicts on the developing tendency of Chinese chlor-alkali industry

The author recommends the following persons to buy this report:

- Manufacturers in the chlor-alkali industry
- Consumers in the lower course of the chlor-alkali industry
- Persons doing business in the export and import of the chlor-alkali industry
- Investors that want to enter Chinese chlor-alkali industry
- Manufacturers and sellers of the chlor-alkali devices
- Other brokers and research institutes that concern Chinese chlor-alkali industry

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