

I Cresols production in China

I-1 Overview of cresols production

Since 1990s, China's cresol industry has seen fast development.....

Table I-2 Capacity and output of all cresol products in China

Item	Para-cresol	Ortho-cresol	Meta-cresol	Cresol m/p mixture	Cresol mixture
Capacity '09, t/a	██████	██████	██████	██████	██████
Output '08, tonne	██████	██████	██████	██████	10,000
Operating rate	██████	██████	██████	56.96%	██████

Source: CCM International

I-2 Meta-cresol production

China's meta-cresol has developed fast in recent years, with the capacity.....

Table I-3 All meta-cresol manufacturers in China, 2009

No.	Name	Location	Ownership	Status	Technology	Source of m-toluidine	Capacity '09, t/a	Output '08' tonne	Share by capacity '09
1	██████	Liaoning	██████	██████	██████	██████	██████	██████	██████
2	██████	██████	██████	██████	██████	Self-supply	██████	██████	██████
3	██████	██████	██████	Active	██████	██████	2,000	██████	██████
4	Jiangsu Huaihe Chemicals Co., Ltd.	██████	██████	██████	██████	██████	██████	██████	██████
5	██████	██████	Private	██████	██████	██████	██████	1,000	██████
6	██████	Hubei	██████	██████	██████	██████	██████	██████	8.39%
7	██████	██████	██████	Active	██████	██████	██████	██████	██████
8	██████	██████	██████	██████	MD	Purchased	██████	██████	██████
9	Zibo Hanbo Chemical Co., Ltd.	██████	██████	██████	██████	██████	██████	██████	██████
Total		-	-	-	-	-	██████	██████	██████

Source: CCM International

II Trade analysis of cresols in China

II-1 Import analysis

II-1.1 Meta-cresol import analysis

Fast development of domestic meta-cresol has contributed to the gradual decrease in import volume of meta-cresol.....

Table II-1 Import situation of meta-cresol in China, 2004-2009 ①

Year	Volume, kg	Value, USD	Price, USD/kg
2004	██████	██████	2.77
2005	██████	18,609,285	██████
2006	██████	██████	██████
2007	6,008,815	██████	██████
2008	██████	██████	██████
2009	██████	██████	██████

Source: CCM International

Note: ① 2009 refers to only Jan.~ Jun. 2009.

II-2.2 Para-cresol export analysis

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Table II-7 All exporters situation of para-cresol in China, 2008

No.	Name	Volume, kg	Value, USD	Price, USD/kg	Share by volume
1	██████	██████	██████	██████	██████
2	██████	██████	██████	3.82	██████
3	██████	██████	██████	██████	██████
4	██████	352,140	██████	██████	██████
5	██████	██████	██████	██████	██████
6	Shanghai Huaxuan Chemical Co., Ltd.	██████	██████	██████	██████
7	██████	██████	205,295	██████	██████
8	██████	██████	██████	██████	██████
9	██████	██████	██████	██████	██████
Total		██████	██████	3.75	██████

Source: CCM International

III Cresol market in China

III-2 Market size of cresols

Table III-2 Market size of cresols in China, 2008

Product	Output, tonne	Import, tonne	Export, tonne	Apparent consumption, tonne	Value, USD ③
Para-cresol	██████	██████	██████	██████	██████
Meta-cresol	██████	██████	██████	██████	██████
Ortho-cresol	██████	██████	██████	██████	██████
Cresol m/p mixture	██████	N/A ②	██████	12,650	██████
Cresol mixture	10,000	██████	N/A ②	██████	9,500,000
Total	██████	██████	██████	██████	██████

Source: CCM International Note: ① Estimated volume according to para-cresol export data in 2008

② IE Data is unavailable, but it is estimated to be small which can be neglected

③ Calculated by using average price of each product to multiply apparent consumption

V Competitive landscape

China's cresol industry is characterized by low technology level.... Based on Michael Porter's diamond model, CCM conducts a brief analysis of the competitiveness of China's cresol industry.

Table V-1 Competitiveness analysis of China's cresol industry, 2009

Item	China's cresol industry
Production factors	Abundant coal resource, with the second largest reserve in the world; ██████
	Labor cost Low
	Mature technologies currently, ██████
Related industry	Fast development of oil refining leads to toluene overcapacity in China, ██████
	Coal tar industry ██████
	██████
Industry strategy, structure	Para-cresol ██████
	At tight oligopoly state; ██████
	Some producers to invest in m-toluidine production to reduce cost.
	Others ██████
Domestic demand	██████
	██████
	██████
	Others Low requirement for cresol mixture quality as ██████
Governmental policy	Release stricter requirement on environmental protection, ██████
Opportunity	New consumption fields ██████

Source: CCM International