

Market Research of Chloromethanes in China

The First Edition

September 2021

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1. Introduction

Chloromethanes (CMS) mainly include methyl chloride, methylene chloride, chloroform and carbon tetrachloride. After years of development, China has become a major CMS production base.

This report is a value analysis of the CMS industry in China, which covers the production, price, imports & exports, and consumption of CMS. Besides, a future forecast on the development trend will be analysed in this report.

The report is based on data sourced by diverse methods, such as desk research, telephone interview, and network search. The data collected and compiled was variously sourced from telephone interviews, published magazines, journals, government statistics and CCM's database, etc. Data obtained from various sources have been combined and cross-checked to ensure that this report is as accurate and methodologically sound as possible.

The key market players in CMS industry are profiled in details. Key market participants studied include Zhejiang Juhua Co., Ltd., Shandong Jinling Group Co., Ltd., Luxi Chemical Group Co., Ltd.

Research scope of the report

Region: China

Time: 2020

Products: methyl chloride, methylene chloride, chloroform, carbon tetrachloride

2. Methodology

The report is based on data sourced by diverse methods, as follows:

- Desk research

Desk research includes access to published magazines, journals, government statistics, industry statistics, customs statistics, association seminars as well as information on the Internet. Much work has gone into the compilation and analysis of the information obtained. Where necessary, information has been checked with Chinese CMS participants regarding intelligence related to market structure and performance characteristics as key producers, key end users, production levels, end user demand and so on.

- Survey

CCM has conducted an extensive survey using telephone interviews in order to study the market of chloromethanes in China.

The interviewees included the following groups:

- Key producers
- Key end users
- Key traders
- Material suppliers
- Associations involved
- Industry experts

- Network search

CCM employs a network to contact industry participants by using B2B websites and software. CCM also obtains registration information via the network.

- Data processing and presentation

The data collected and compiled was variously sourced from:

- CCM's database
- Published articles from periodicals, magazines, journals and third party databases
- Statistics from governments and international institutes
- Telephone interviews with domestic producers, service suppliers and government agencies
- Third-party data providers
- Comments from industrial experts
- Professional databases
- Information from the Internet

The data has been combined and cross-checked to ensure that this report is as accurate and methodologically sound as possible. Throughout the process, a series of discussions were held within CCM to systematically analyse the data and draw appropriate conclusions.

Definition

There are two main technical pathways for the production of chloromethanes in China: methanol pathway and methane pathway. Methanol pathway is the target for research in this report, and here this pathway only counts the manufacturers that produce one or more CMS products and are equipped with CTC conversion projects.

3. Executive summary

Chloromethanes (CMS) mainly include methyl chloride, methylene chloride, chloroform and carbon tetrachloride. After years of development, China has become a major CMS production base.

In 2020, there were XXX CMS manufacturers with capacity over XXX million t/a. Specifically:

- Methyl chloride: production capacity XXX t/a, with output of XXX tonnes and an average annual price of XXX.
- Methylene chloride: production capacity XXX t/a, with output of XXX tonnes and an average annual price of XXX.
- Chloroform: production capacity XXX t/a, with output of XXX tonnes and an average annual price of XXX.
- Carbon tetrachloride: output of XXX tonnes, with an average annual price of XXX.

The CMS import and export in China were XXX tonnes and XXX tonnes in 2020. China's CMS import was quite small. As to export, the volume of methylene chloride, chloroform and carbon tetrachloride reached XXX tonnes, XXX tonnes and XXX tonnes respectively.

In China, CMS are very important raw materials for organic synthesis and solvent. They are mainly used in refrigerant, pharmaceutical, and silicone industries. Besides, they can be used to produce cellulose ethers, some pesticides and so on. They can also be used as adhesives, foaming agents and cleaning agents. In 2020, consumption volume of methyl chloride, methylene chloride, chloroform and carbon tetrachloride in China was approximately XXX tonnes, XXX tonnes, XXX tonnes, and XXX tonnes respectively.

At present, China's CMS industry is not only facing the pressure of overcapacity, but also dealing with risks caused by lower-than-expected downstream demand. Therefore, in order to promote a healthy and orderly development of the industry, the manufacturers need to increase the development of its downstream products, and continue to improve and extend the industrial chain.

4. What's in this report?

In 2020, the capacity and output of methyl chloride in CMS manufacturers in China were XXX t/a and XXX tonnes respectively, with an operating rate of XXX.

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Table 2.1.1-1 Capacity and output of methyl chloride in CMS manufacturers in China, 2020

No.	Producer	Location	Status	Capacity, t/a	Output, tonne
1	Shandong Jinling Chemical Co., Ltd.	Shandong Province	Active	XXX	XXX
2	XXX	XXX	XXX	XXX	XXX
...

Source: CCM

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Figure 2.1.1-1 Capacity distribution of methyl chloride in China by region, 2020



Source: CCM

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Table 2.1.1-2 Output and share of methyl chloride in CMS manufacturers in China, 2020

Item	Volume, tonne	Share
Top two	XXX	XXX
Top four	XXX	XXX
Total	XXX	/

Source: CCM

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In 2020, fluctuation of the ex-works price of methyl chloride was mainly affected by market supply.

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Figure 2.1.2-1 Monthly ex-works price of methyl chloride in China, 2020



Source: CCM

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In 2020, consumption volume of the methyl chloride produced by CMS manufacturers was about XXX tonnes in China: XXX of the methyl chloride thus produced was consumed in silicone industry, approximately XXX was used as a raw material for XXX another ...

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Figure 2.1.3-1 Consumption pattern of methyl chloride in China, 2020



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