

II Production situation of ethoxylate industry in China

II-2 Summary of ethoxylate producers

Table II-2-1 Top ethoxylate producers in China, 2009

Manufacturer		Main product	Capacity, t/a,	EO derivatives	Process and equipment origin
Zhejiang SinoLight Chemical Co., Ltd.		AES	██████	██████████	██████
Zhejiang Zanyu Technology Co., Ltd.		AES	██████	██████	██████
China Resources (Boxing) Oleochemicals Co., Ltd.	Fatty amine ethoxylate	██████	██████	██████
Jiangsu Subei Chemical Co., Ltd.		AEO, etc.	██████	██████	██████

Source: CCM International Ltd.

II-4 Ethylene oxide supply situation

II-4.1 General introduction to ethylene oxide production situation in China

Table II-4.1-2 Output of EO in China in 2005~2008

Group	Manufacturer	EO output (equivalent), tonne			
		2005	2006	2007	2008
SINOPEC	Beijing Yanhua Petrochemical	██████	██████	██████	██████
	Shanghai Petrochemical	██████	██████	██████	██████
	Subtotal	██████	██████	██████	██████
CNPC	Jilin Petrochemical	██████	██████	██████	██████
	Dushanzi Petrochemical	██████	██████	██████	██████
	Subtotal	██████	██████	██████	██████
CSPC	CSPC	██████	██████	██████	██████
Others	BBCA Biochem Anhui	██████	██████	██████	██████
	Jiaying Sanjiang	██████	██████	██████	██████
	Subtotal	██████	██████	██████	██████
Total		██████	██████	██████	██████

Source: CCM international

II-4.3 Marketable EO in China

Table II-4.3-1 Production situation of marketable EO in China in 2004~2008

Year	Marketable EO				
	Capacity	Growth	Output	Growth rate	Proportion in total
	(t/a)	rate	(tonne)		EO output
2004					
2005					
2006					
2007					
2008					

Source: CCM international

II-5 Profitability

Table II-5-1 Cost structure of AEO, Aug. 2009

Item	Unit cost, USD/t	Cost share
EO		
Other raw materials		
Utility		
Transportation cost		
Others		
Total		
Ex-factory price, USD/t		
Profit, USD/t		

Source: CCM International

III Demand of ethoxylate in China

III-1 Household chemicals industry

Table III-1-1 Consumption volume of major ethoxylate products in household chemicals, 2008.

Ethoxylate	AEO2/3	AEO7	AEO9	FMEE	Others	Total
Volume, tonne						

Source: CCM International

III-2 Textile & dyeing

Table III-2-1 Consumption volume of major ethoxylate products in textile & dyeing industry, 2008.

Ethoxylate	APEO	AEO	FEE	Fatty amine ethoxylate	Fatty ethoxylate	acid	Others	Total
Volume, tonne								

Source: CCM International

IV IE analysis

IV-1 AEO import analysis.

Table IV-1 Import structure of ethoxylate, 2008

Ethoxylate	AEO	NPEO	OPEO	Total
Import volume, tonne				

Source: CCM International

Table IV-1-1 Import situation of AEO by importer, 2008

Name	Import volume, tonne	Price, USD/kg
Sinolight Material Co., Ltd.		
Zhejiang Provincial Light & Textile Group Light Industry Co., Ltd.		
Guangzhou Economic & Technical Development District Construction I/e Co., Ltd.		
Sasol (China) Chemical Co., Ltd.		
Others		
Total		

Table IV-1-3 Import situation of AEO by import origin, 2008

Country	Import volume, tonne	Price, USD/kg
US		
Malaysia		
Denmark		
Total		

Source: CCM International

IV-2 NPEO import analysis

TableIV-2-1 Import situation of NPEO by importer, 2008

Name	Import volume, tonne	Price, USD/kg
Guangzhou Economic & Technical Development District Construction I/e Co., Ltd.		
Hangzhou Transfar Trade Co., Ltd.		
Heihe Huahai Trade Co.		
Manzhouli Beryl Economic and Trade Co., Ltd.		
Others		
Total		

Source: CCM International

V Introduction to key ethoxylate products in China

V-1 Fatty alcohol ethoxylate derivatives (AEO)

V-1.2 Production

Figure V-1.2-1 Top AEO manufacturers in China, 2009

Manufacturer	Product	Capacity, t/a, Aug. 2009
Zhejiang Jiaxing Sanjiang Chemical Co., Ltd.	AEO, NPEO	
Liaoning Huaxing Group	AEO, etc., AES	
Zhejiang Huangma Chemical Industry Group Co., Ltd.	AEO, etc.	

Source: CCM International

VII-3 Forecast

VII-3.2 Forecast on output and demand

Table VII-3.2-4 Growth rate of AEO output, 2002-2008

Year	2002	2003	2004	2005	2006	2007	2008
Growth rate							

Source: CCM International