

# Chemical Market Research in China

Introduction by

**MC** Chemicals and



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## MCC/TZMI provide customized, high-quality information on China's chemical markets

### Good Chemical China Market Information is vital ...

- Markets develop and change rapidly
- Markets are often highly fragmented
- Markets are intransparent
- Published market information is limited
- Planned additional investments enhance need for solid information base to estimate project returns

### ... But often very difficult to obtain

- Internal market research is often unsuccessful due to lack of functional expertise
- Some external research providers are cheap, but results are unreliable and lack understanding of broader industry context
- Some external researchers are extremely expensive and rely more on interpretation of facts than a solid analysis of the situation

### Chemical Market Research provided by MCC/TZMI:

- Reliable and in depth
- Customized according to client requirements
- Reasonably priced
- Based overwhelmingly on primary research (interviews) rather than on secondary sources
- Deep level of industry expertise
- Good understanding of strategic issues of the chemical industry

## The cooperation combines high-level chemical and market research expertise to benefit clients

### Requirements for successful chemical market research in China

Requirement or Capability	Contribution by		Overall Capability MCC/TZMI	Comment
	MCC	TZMI		
In-depth understanding of Chinese chemical industry	+++	+	+++	More than 12 years of China experience
Highly qualified local research staff	+	+++	+++	TZMI has 8 full-time local staff
Reasonable price for high-quality reports	++	+++	+++	Typical price range 10-30 k USD
Detailed chemical knowledge to understand client information needs	+++	++	+++	Dr. Pflug is an experienced Ph.D. Chemist
Extensive experience market research in China	++	+++	+++	TZMI has proven tools from other market
Flexible, fast execution of market research and consulting projects	+++	+++	+++	Typically 4-6 weeks from project start

## Dr. Pflug of MCC has been a consultant to the chemical industry in China for the past 12 years

### Information on Dr. Pflug (see [www.mc-chemicals.com](http://www.mc-chemicals.com))

- Ph.D. in Chemistry, Master in Economics
- Working experience in the chemical industry (5 years, primarily in R&D)
- 15 years experience in consulting to the chemical industry (A.D. Little and others)
- 12 years of living and working experience in China
- Since 2009: CEO, Management Consulting – Chemicals (Shanghai, Hong Kong)
- Exclusive focus on consulting to chemical industry in China



### Selected Papers on Chinese Chemical Industry

Acquisitions of chemical MNCs in China  
 Automotive plastics in China  
 Basic chemicals in China  
 Bioplastics in China  
 Chemical distribution in China  
 China's chemical industry and the Middle East  
 China's growing mid-market for chemicals  
 Clean technologies: Opportunities in China  
 Client Requirements in CN Chemical Industry  
 Coal chemicals in China  
 Commodity plastics in China  
 Cooperation in Chemicals: China and India  
 Economical transformation in China

Environmental protection in China  
 Fine chemicals in China  
 Growth issues for foreign chemical companies  
 Improving local Chinese chemical companies  
 Innovation in chemicals in China  
 IP protection for chemical companies in China  
 Knowledge management in China chemicals  
 Leadership of chemical firms in China  
 Localization of chemical firms in China  
 Measuring China's Importance  
 MNCs and their attractiveness as employers  
 Ownership and success of CN chemical firms  
 Private equity in the Chinese chemical industry

R&D cooperation with Chinese chemical firms  
 Risk management of Chinese chemical firms  
 Salary trends in China's chemical industry  
 Site search for the chemical industry in Asia  
 SOEs and MNCs as chemical employers in CN  
 Specialty chemicals in China  
 Strategy development of China chemical firms  
 Target search in China's chemical industry  
 Tianjin explosions and their implications  
 Trends in China's chemical industry  
 Wanhua: Challenges of globalization  
 Western players: Is the playing field level?  
 Working as an expat in Chinese chemical firms

## TZMI is a global advisory firm in the opaque mineral and chemical sectors

### Information on TZMI (see [www.tzmi.com](http://www.tzmi.com), [www.cmrhoutex.com](http://www.cmrhoutex.com) )

- TZMI and its wholly owned subsidiary, Chemical Market Resources, have primary research teams in Shanghai and Houston and conduct thousands of interviews annually
- Our consultants have decades of chemicals industry experience and are complemented by economists and local researchers experienced in in-person interviews
- TZMI uses a tried and tested interview process to ensure interviews are successfully completed to a high standard, information is verified and results are meaningful for a client. We think good analysis is built on a thorough understanding of the logic of a market's value chain. This is the product of primary research, multi-variate computation, modelling and value-added insight from qualified market participants
- Our hybrid approach of local primary research done to international standards ensures competitive rates



TZMI's China team is a mixture of chemical engineers and economists. They have conducted research in every region of China, covering multiple chemicals markets.

# Our vast expertise allows us to efficiently conduct research in complex chemical markets

## Examples: Previous market research areas

### Functional Segments

- Adhesives
- Agrochemicals
- Automotive Plastics
- Basic Chemicals
- Chemical Distribution
- Coatings
- Dental Materials
- Engineering Plastics
- Fibers
- Flavors & Fragrances
- Food
- Leather Chemicals
- Lubricants
- Pharma Ingredients
- Plastics Additives
- Plastics Compounding
- Water Treatment

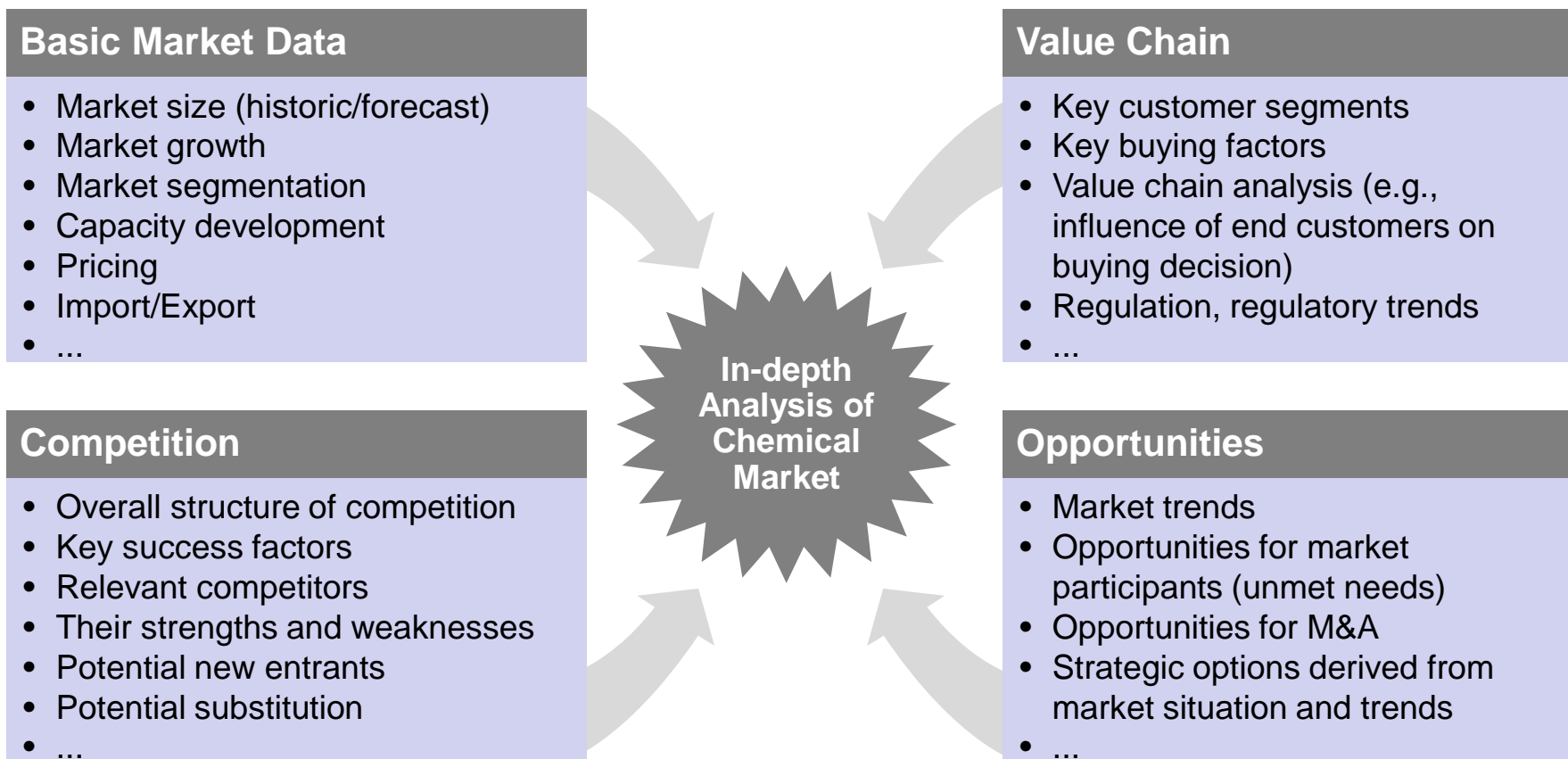
### Individual Chemicals

- Acetic Acid/VAM
- Aniline
- Coal Chemicals
- Fluorochemicals
- Gelatin
- Humic Acid
- Iron Oxide Pigments
- Isocyanates (MDI, TDI)
- Isoprene Rubber
- Metallocenes
- Polyamide
- Polyolefins (PE, PP)
- PVC
- Soda Ash
- Sodium Bicarbonate
- Titanium Dioxide
- Vanillin



# Our chemical market research typically covers both basic data and strategic aspects

## Typical Content of Chemical Market Study



**In sum, we provide customized, strategically relevant market research at reasonable rates**

**China Chemical Market Research by MCC/TZMI**





## We will be happy to meet with you in person for a face-to-face discussion of our support offerings

Please contact



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*We also welcome the opportunity to directly provide a proposal covering a market segment or chemical material of your interest. Please inform us of your requirements.*

