



STRATEGIC ANALYSIS INC.

**ASSESSMENT OF INDUSTRIAL GAS
MARKET IN CHINA**

**COMPREHENSIVE ANALYSIS OF THE INDUSTRIAL GAS
INDUSTRY AND ITS KEY SUPPLIERS**

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BACKGROUND

Western markets for industrial gases are mature and growing at GDP or slightly higher rates depending on the region, whereas industrial gases consumption in China is increasing rapidly.

The objective of the study is to assess the characteristics of the industrial gas market in China and the drivers and trends affecting the growth of the various end use market segments.

The study will also serve as a source for competitor information on foreign and Chinese suppliers of industrial gases.

A preliminary outline of the study is provided in Table 1.

STUDY GOALS AND OBJECTIVES

Strategic Analysis will use its on-the-ground staff in offices in Beijing and Shanghai to comprehensively:

1. Survey all published information from government agencies, trade associations, and other industry publications and other sources.
2. Access SAI's non-confidential database developed over 10 years of conducting market assessments in China.
3. Conduct field interviews with such industry experts as key customers, competitors, industrial gas suppliers, distributors and wholesalers, and existing management and former employees of the target firms covered in the study.

SAI's staff of experts conducting the research has an average ten years of industry experience in China. Most have technical backgrounds and business degrees and have worked with multinational corporations to assist them in developing strategies for growth in China, including strategic market assessments.

STRATEGIC ANALYSIS INC.

SAI, a leading international consulting firm, has been in business for over 30 years and has 260 employees in 12 offices around the world. With its headquarters in the Greater Philadelphia area, SAI has international centers of operations in Brussels, Mexico City; Tokyo; Singapore and Mumbai.

SAI's Greater China operation, headquartered in Beijing and operations in Shanghai, has operated for ten years. SAI has a staff of professionals with technical degrees in chemical and mechanical engineering, chemistry and polymer science; and graduate business degrees. SAI's staff consists of Chinese and Taiwanese nationals

with understandings of business practices, local culture and appropriate language skills that allow them to effectively develop the information and analysis required for this unique subscription service.

SAI's staff in China also works with multinational corporations around the world to:

- Develop strategies for China
- Identify and evaluate sites for production facilities
- Assess market opportunities for products and services
- Identify and evaluate acquisition and joint venture partners
- Develop complete understandings of the distribution systems and the most effective approach to the market
- Analyze customer segments throughout China to understand the best approach and value proposition
- Identify and analyze raw material sources

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Table 1

MARKET ASSESSMENT OF INDUSTRIAL GASES IN CHINA

STUDY OUTLINE

I. INDUSTRIAL GAS TECHNOLOGY ASSESSMENT

- Product types used
- Applications used
- Production processes
- Equipment used and cost of equipment

II. END-USE MARKET ANALYSIS

- Global and Chinese industrial market size and growth rates
- Industry structure and supply modes
- Market segments demand volumes and growth rates
- Market trends

III. INDUSTRIAL GAS SUPPLIERS PROFILES (foreign and local)

- Number of company operations
- Revenue per supply mode
- Market share per supply mode
- Production capacity