

Chemical Fiber Industry Market Research (China)



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In 2006, China's chemical fiber industry presented a rapidly growing momentum, the output and apparent consumption reached 20.2547 million and 20.5778 million tons respectively, up 24.32% and 20.31% separately. Besides, China's chemical fiber output and consumption both shared the largest proportion in the world. At present, China's chemical fiber shows a fine development trend, the domestic output and consumption will continuously grow. It is estimated that in 2007, the chemical fiber output and apparent consumption will reach 23.54 million and 23.3 million tons respectively.

In 2006, China's chemical fiber maintained a comparatively concentrated production distribution. Zhejiang, Jiangsu, Fujian, Shandong and Shanghai ranked top 5 by output in China, among which Zhejiang and Jiangsu had absolute advantages, because Zhejiang's annual output was 8.1269 million tons, accounting for 40.12% of China's total, and Jiangsu's yearly output was 6.6514 million tons, accounting for 32.84%. The gross output of Zhejiang and Jiangsu shared over 70% of China's total, indicating China's unbalanced distribution in terms of chemical fiber production.

The year 2006 witnessed a continuous decline in China's chemical fiber import volume, which was merely 1.3404 million tons, down 11.91% year-on-year; on the contrary, the export volume kept increasing rapidly, reaching 1.0173 million tons, up 43.3% from a year earlier.

By the end of Dec 2006, there had been 1378 enterprises in China's chemical fiber industry, and the enterprise investment structure was dominant by foreign-funded and HK-, Macao- and Taiwan-funded enterprises; owners' equity was RMB 38.171 billion, holding the proportion of 35.74%, which was followed by private enterprises, state-owned enterprises and corporate enterprises with the proportion of 18.39%, 16.72% and 10.62% in file.

In 2006, the accumulated product sales income in China's chemical fiber industry amounted to RMB 310.663 billion, up 22.47% year-on-year; the accumulated annual profit reached RMB 6.622 billion, increasing by RMB 1.77 billion with a growth rate of 36.48%.

In 2006, there were 35 large-size enterprises in China's chemical fiber industry, merely accounting for 2.54%; yet in terms of assets, sales income and employee number, large enterprises ranked first with the proportion of 41.24%, 38.19% and 41.29% respectively, and the profit shared a proportion of 28.8%; medium-size enterprises added up to 167, accounting for 12.12% of the whole industry, yet the proportions in assets, sales income and employee number were all about 1/3, and the profit shared 42.12% of the total; small-size enterprises totaled up to 1176, accounting for 85.34%, yet each of their scale indicator remained lower than 30%. Large-size enterprises had the strongest profitability.

Considering from the ownership structure, in 2006, the assets, sales income and profit of China's chemical fiber industry mainly centralized in private enterprises, foreign-funded, HK-, Macao- and Taiwan-funded enterprises. Private companies respectively shared 21.57%, 31.29% and 44.96% in terms of assets, sales income and profit; HK-, Macao- and Taiwan-funded enterprises respectively held the proportion of 31.23%, 28.29% and 31.43%.

The whole loss-making percentage of chemical fiber industry in 2006 was 19.3%, of which large-size, medium-size and small-size enterprises respectively had the loss-making rate of 17.14%, 26.95% and

18.28%. In China's 2006 fiber chemical industry, the top 20 enterprises ranking by sales income shared 35.44% in assets, 39.55% in sales income and 38.48% in profit, manifesting a comparatively higher concentration degree of chemical fiber industry.

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