

China Flame Retardant Industry Report, 2012-2015

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Abstracts

Different from other sectors, the flame retardant industry is a policy-driven industry. So, the establishment of fire prevention rules and standards brings objective demand for the development of flame retardant industry. Out of environmental protection concerns, increasingly strict supervision on flame retardants fuels the demand.

China has been a large producer and supplier of flame retardant in the world, with the output in 2011-2012 approximating 800,000-900,000 tons. Driven by the development of downstream industries such as electronics and automotive manufacturing as well as favorable fire-prevention and flame-retardant policies, China consumed around 750,000 tons of flame retardants in 2012. Considering such factors as domestic requirements on flame retarding and cost, chlorinated and brominated flame retardants are still taking a lion's share in Chinese flame retardant market, with the proportion as high as 50% or so.

Meanwhile, China fire retardant industry is upgrading product mix and technologies so as to follow the global development trend of halogen-free flame retardants. In 2012, the halogen-free fire retardant output in China approximated 415,000 tons, of which, 150,000 tons were exported to other countries. Nowadays, Chinese industrial players are committed to the R&D, expanding and building of new halogen-free flame retardant projects. Cases in point include Jiangsu Yoke Technology which is scheduled to expand its 40,000-ton/a TCPP and TDCP series products projects as well as 20,000-ton/a new-type flame retardant production, Jinan Taixing Fine Chemicals Co.,Ltd. which plants to construct its 30,000-ton/a halogen-free flame retardant project, and Taizhou Xin'an which is set to conduct the 40,000-ton/a phosphate esters series flame retardant production line technological upgrading project, and so forth.

Currently, there are more than 1,000 flame retardant producers in China. However, when compared with international magnates such as Albemarle, ICL and ADEKA, they

are not in the position to compete with these foreign counterparts in an all-around way. Chinese flame retardant enterprises are featured with relatively small capacity and only involvement in one single flame retardant business. In China, main halogen-based product is brominated flame retardant, with major producers concentrating in regions with abundant bromine resources like Shandong and being presented by Shouguang Weidong Chemical Co.,Ltd., Brother Enterprises Holding Co.,Ltd. and Shouguang Shen Runfa Ocean Chemical Industry. Moreover, phosphorus flame retardants have seen rapid development and grown into a hot variety, with major producers including Jiangsu Yoke Technology, Zhejiang Wansheng Co., Ltd and Tianjin Lianrui Chemical. In addition, there are numerous inorganic flame retardant manufacturers in China, but mostly large ones are specialized in mining business with rich ore resources, with representatives covering CHINALCO Shandong Branch and Hsikwangshan Twinkling Star Co., Ltd.(Hts).

The report touches on the followings:

Policy Environment, Global Market, Status Quo, Competition Pattern and Outlook of China Flame Retardant Industry;

Supply & Demand, Competition Pattern, and Prospects of Flame Retardant Market Segments in China;

Operation, Flame Retardant Business and Development Outlook of Five Global and Six Chinese Flame Retardant Companies.

Contents

1. OVERVIEW OF FLAME RETARDANT INDUSTRY

1.1 Definition and Classification

1.2 Application Fields

2. DEVELOPMENT OF CHINA FLAME RETARDANT INDUSTRY

2.1 Operating Environment

2.1.1 Policies and Regulations

2.1.2 International Market

2.2 Status Quo

2.3 Competition Pattern

2.4 Influence from Upstream and Downstream Industries

2.4.1 Upstream Sector

2.4.2 Downstream Sector

2.5 Development Prospects and Prediction

3. FLAME RETARDANT MARKET SEGMENTS

3.1 Halogen Flame Retardant

3.1.1 Supply & Demand

3.1.2 Competition Pattern

3.1.3 Development Outlook and Prediction

3.2 Phosphorus Flame Retardant

3.2.1 Supply & Demand

3.2.2 Competition Pattern

3.2.3 Development Outlook and Prediction

3.3 Inorganic Flame Retardant

3.4 Others

4. LEADING FLAME RETARDANT COMPANIES WORLDWIDE

4.1 Albemarle

4.1.1 Profile

4.1.2 Operation

4.1.3 Revenue Structure

4.1.4 R&D and Investment

- 4.1.5 Flame Retardant Business
- 4.1.6 Business in China
- 4.2 Chemtura
 - 4.2.1 Profile
 - 4.2.2 Operation
 - 4.2.3 Revenue Structure
 - 4.2.4 R&D and Investment
 - 4.2.5 Flame Retardant Business
 - 4.2.6 Business in China
- 4.3 ICL
 - 4.3.1 Profile
 - 4.3.2 Operation
 - 4.3.3 Revenue Structure
 - 4.3.4 R&D and Investment
 - 4.3.5 Flame Retardant Business
 - 4.3.6 Business in China
- 4.4 Clariant
 - 4.4.1 Profile
 - 4.4.2 Operation
 - 4.4.3 Revenue Structure
 - 4.4.4 Flame Retardant Business
 - 4.4.5 Business in China
- 4.5 ADEKA
 - 4.5.1 Profile
 - 4.5.2 Operation
 - 4.5.3 Revenue Structure
 - 4.5.4 Flame Retardant Business
 - 4.5.5 Business in China

5. MAIN FLAME RETARDANT COMPANIES IN CHINA

- 5.1 Jiangsu Yoke Technology
 - 5.1.1 Profile
 - 5.1.2 Operation
 - 5.1.3 Revenue Structure
 - 5.1.4 Gross Margin
 - 5.1.5 Clients & Suppliers
 - 5.1.6 R&D and Investment
 - 5.1.7 Flame Retardant Business

- 5.1.8 Development Outlook and Prediction
- 5.2 Zhejiang Wansheng Co., Ltd
 - 5.2.1 Profile
 - 5.2.2 Flame Retardant Business
- 5.3 Shouguang Weidong Chemical Co.,Ltd.
 - 5.3.1 Profile
 - 5.3.2 Operation
- 5.4 Brother Enterprises Holding Co.,Ltd.
 - 5.4.1 Profile
 - 5.4.2 Operation
- 5.5 Shouguang Shen Runfa Ocean Chemical Industry Co., Ltd
 - 5.5.1 Profile
 - 5.5.2 Operation
- 5.6 Tianjin Lianrui Chemical

Selected Charts

SELECTED CHARTS

Classification of Flame Retardant by Application

Classification and Advantages & Disadvantages of Flame Retardant by Composition

Performance: Brominated Flame Retardant vs. Phosphorus Flame Retardant vs.

Inorganic Flame Retardant

Downstream Consumption Structure of Flame Retardant Worldwide

Main Flame Retardant Products and Their Applications

Varieties of Flame Retardants in Asia and Europe

Some Chinese Flame Retardant Makers ,Their Products and Capacities, 2012

Liquid Chlorine (99.6%) Price Trend in China, 2011-May, 2013

Yellow Phosphorus Price Trend in Main Chinese Producing Regions, 2004-May, 2013

Output of Plastic Products in China, 2008-2012

Planned/Ongoing Flame Retardant Projects in China, as of Apr.2013

Capacity Structure (%) of Bromine Series Products Manufacturers Worldwide, 2012

Demand for Varieties of Phosphorus Flame Retardant Worldwide, 2012

Some Chinese Phosphorus Flame Retardant Makers, Their Products and Capacities, 2012

Sales and Profit of Albemarle, 2010-2012

Sales of Albemarle by Division, 2010-2012

R&D Costs and % of Total Revenue of Albemarle, 2010-2012

Some Flame Retardant Products of Albemarle

Distribution of Albemarle's Flame Retardant Business-related Equipments, 2012

Sales from Flame Retardant Business of Albemarle, 2010-2012

Primary Products, Terminal Consumers and Commodities of Chemtura

Sales and Profit of Chemtura, 2009-2012

Sales of Chemtura by Product, 2009-2011

R&D Costs and % of Total Revenue of Chemtura, 2009-2011

Revenue and Profit from Industrial Engineering Business of Chemtura, 2009-2011

Main Products of ICL and Ranking in Global Market

Capacity of ICL's Major Products, 2012

Output of ICL's Major Products, 2012

Sales and Profit of ICL, 2010-2012

Sales of ICL by Business, 2010-2012

Sales of ICL by Region, 2010-2012

R&D Costs and % of Total Revenue of ICL, 2009-2012

Sales from Flame Retardant Business of ICL, 2010-2012

Companies under ICL in China

Primary Businesses of Clariant

Sales of Clariant, 2010-2012

Sales of Claritane by Business, 2011-2012

Sales and EBITDA of Clariant, 2011-2012

Main Subsidiaries under Clariant in China, 2012

Main Businesses and Products of ADEKA

Sales and Profit of ADEKA, 2009-2012

Sales and Profit of ADEKA by Product, 2011-2012

Main Flame Retardant Products of ADEKA and Their Applications

Subsidiaries under ADEKA in China

Subsidiaries under Jiangsu Yoke Technology and Their Primary Businesses

Revenue and Net Income of Jiangsu Yoke Technology, 2010-2012

Revenue of Jiangsu Yoke Technology by Product, 2010-2012

Revenue of Jiangsu Yoke Technology by Region, 2010-2012

Gross Margin of Jiangsu Yoke Technology by Product, 2010-2012

Jiangsu Yoke Technology's Revenue from Top 5 Clients and % of Total Revenue, 2010-2012

Jiangsu Yoke Technology's Procurement from Top 5 Suppliers and % of Total Procurement, 2010-2012

R&D Costs and % of Total Revenue of Jiangsu Yoke Technology, 2009-2012

Revenue and Gross Margin from Flame Retardant Businesses of Jiangsu Yoke Technology, 2010-2012

Revenue and Net Income of Jiangsu Yoke Technology, 2012-2015E

Planned/Ongoing Projects of Zhejiang Wansheng Co., Ltd

Total Assets and Total Liabilities of Shouguang Weidong Chemical Co.,Ltd., 2008-2009

Revenue and Profit of Shouguang Weidong Chemical Co.,Ltd., 2008-2009

Total Assets and Total Liabilities of Brother Enterprises Holding Co.,Ltd., 2008-2009

Revenue and Profit of Brother Enterprises Holding Co.,Ltd., 2008-2009

Total Assets and Total Liabilities of Shouguang Shen Runfa Ocean Chemical Industry, 2008-2009

Revenue and Total Profit of Shouguang Shen Runfa Ocean Chemical Industry, 2008-2009

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