

China Fluorine Chemical Industry Chain Report, 2012-2015

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Abstracts

Fluorine chemical industry treats fluorite as main raw material, with downstream products embracing inorganic fluoride and organic fluoride.

China's recoverable reserves of fluorite merely accounts for about one-tenth of the world total, but the output occupies the first position with a proportion of more than 50%. Since 2010, China has tightened control over fluorite mining exploration, causing a slight decrease in output, down to 2.9 million tons in 2011. In China, the distribution of fluorite production is relatively concentrated, Hunan, Zhejiang, Inner Mongolia, Jiangxi, Yunnan and Fujian provinces (or autonomous regions) contribute an approximate 85%.

Inorganic fluoride sub-industries mainly refer to hydrofluoric acid, aluminum fluoride, electric grade fluoride, and so on.

For now, hydrofluoric acid and aluminum fluoride industries in China have stepped into advanced development stage, with excess supply; in future, adjustment of product structure will be the focus, whereupon, backward production capacity will be gradually phased out. In 2011, China's total capacity of hydrofluoric acid reached 1.645 million tons, major manufacturers include Dongyue Group Ltd., Yingpeng Chemicals Co., Ltd., Do-Fluoride Chemicals Co., Ltd. (Hereinafter called "DFD"), etc.; total capacity of aluminum fluoride attained to 1.3 million tons, major manufacturers are Hunan Nonferrous Fluoride Chemical Group (HNFG), DFD, CNMC (Ningxia) Orient Group Limit Company, etc..

In China, electric grade fluoride is currently at its early stage of development, mostly represented by lithium hexafluorophosphate (LiPF₆), whose capacity in 2011 experiencing a year-on-year increase of 123.0% to 2,720 tons, inclusive of 1,620 tons

contributed by Morita Chemical Industries Co., Ltd. in China, accounting for 59.6%. However, LiPF₆ capacities of DFD, Tianjin Jinniu Power Sources Material Co., Ltd., Jiangsu Jiujijiu Technology Co., Ltd. are seeing rapid growth, and will climb to 2,200 tons, 2,000 tons and 2,000 tons in 2013, respectively.

Organic fluoride sub-industry is chiefly compromised of fluorine refrigerant, fluorine-containing polymer (fluoropolymer), and so on.

In China, fluorine refrigerants mainly refer to R22, R134a, R125 and R32, whose aggregate capacity in 2011 up to 964,000 tons, of which, R22 is the most widely used type for the present, but due to its destruction of the ozone layer, a step-by-step elimination will be inevitable; R134a is primarily employed as the automotive air-conditioning refrigerant, and Zhejiang Juhua Co., Ltd. as the leading company makes capacity of 58kt/a; R32 and R125 have found wide application in production of R410a and other mixed refrigerants (significant alternatives of R22), key enterprises are Jiangsu Meilan Chemical Co., Ltd. with 16k/a R32 and Sinochem Lantian Co., Ltd. with 11kt/a R125.

Among Chinese fluoropolymer products, only PTFE is relatively developed, others such as PVDF and fluororubber are in the initial stages of development. In 2011, China's PTFE capacity reached 97kt, major manufacturers include Dongyue Group Ltd.(with capacity of 30kt/a), Zhonghao Chenguang Research Institute of Chemical Industry (15kt/a) and Zhejiang Juhua Co., Ltd (13kt/a).

China Fluorine Chemical Industry Chain Report, 2012-2015 of ResearchInChina mainly covers the followings:

Supply/demand, consumption structure, import/export, price trend, etc. of fluorite industry;

Capacity, consumption structure, import/export, price trend, etc. of fluorine refrigerant and fluoropolymer industries;

Capacity, import/export, price trend, etc. of hydrofluoric acid and aluminum fluoride industries;

Operation, fluorine chemical business, growth prediction, etc. of 11 fluorine chemical companies;

Development goals, planning, demand forecasting, etc. of fluorine chemical industry during 2011-2015.

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