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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 ($LiPF_6$), 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 Jiujiujiu 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.

Contents

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5. MAIN MANUFACTURERS

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6. OUTLOOK FOR 2011-2015

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Selected Charts

SELECTED CHARTS

Fluorine Chemical Industrial Policies
Relationship among Major Fluorine Chemical Products
Development Phase of Major Fluorine Chemical Products in China
Value-added Roadmap of Major Fluorine Chemical Products
Breakdown of Global Fluorite Mineral Output by Region, 2011
Fluorite Output and YoY in China, 2006-2011
Fluorite Apparent Consumption and YoY in China, 2006-2011
Downstream Consumption Structure of Fluorite in China, 2011
China's Import / Export Volume of Fluorite (Calcium Fluoride Content ?97%), 2008-2012
China's Import/Export Unit Price of Fluorite (Calcium Fluoride Content ?97%), 2008-2012, 2008-2012
China's Import Source Distribution of Fluorite (Calcium Fluoride Content ?97%) by Import Volume, 2011
China's Export Destination Distribution of Fluorite (Calcium Fluoride Content ?97%) by Export Volume, 2011
China's Import / Export Volume of Fluorite (Calcium Fluoride Content ?97%), 2008-2012
China's Import / Export Unit Price of Fluorite (Calcium Fluoride Content ?97%), 2008-2012
China's Import Source Distribution of Fluorite (Calcium Fluoride Content ?97%) by Import Volume, 2011
China's Export Destination Distribution of Fluorite (Calcium Fluoride Content ?97%) by Export Volume, 2011
China's Fluorite Import / Export Volume, 2008-2012
China's Fluorite Import / Export Unit Price, 2008-2012
Fluorite Price Trend in China, 2010-2011
Classification and Main Products of Organic Fluorine Chemicals
Classification and Main Products of Fluorine Refrigerant
Development Process of Fluorine Refrigerant
Key Dates for R22 Refrigerant Phase-out Stipulated by the Montreal Protocol
Capacity of Major Fluorine Refrigerant Products in China, 2011
Capacity of Major R22 Manufacturers in China, 2010-2011
Downstream Demand Structure of R22 Products in China, 2011
R22 Price Trend in East China Market, 2008-2011

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Capacity of Major R134a Manufacturers in China, 2011-2012
Downstream Demand Structure of R134a Products in China, 2011
R134a Price Trend in East China Market, 2008-2011
Capacity of Major R32 Manufacturers in China, 2011-2012
Capacity of Major R125 Manufacturers in China and Proportion, 2011
Capacity of Major PTFE Manufacturers in China and Proportion, Jan-Sep 2012
Downstream Demand Structure of PTFE in China, 2011
China’s Import / Export Volume of Primary Shape PTFE, 2008-2012
China’s Average Import / Export Price of Primary Shape PTFE, 2008-2012
China’s Import Source Distribution of Primary Shape PTFE by Import Volume, 2011
China’s Export Destination Distribution of Primary Shape PTFE by Export Volume, 2011
Price Trend of PTFE Dispersion Resin in China, Jan-Jul 2012
Capacity, Output and Operating Rate of Hydrofluoric Acid in China, 2006-2011
Capacity of Major Hydrofluoric Acid Manufacturers in China, 2011
China’s Hydrofluoric Acid Capacity Breakdown by Region, 2011
China’s Import / Export Volume of Hydrofluoric Acid (Hydrogen Fluoride), 2008-2012
China’s Import / Export Unit Price of Hydrofluoric Acid (Hydrogen Fluoride), 2008-2012
China’s Import Source Distribution of Hydrofluoric Acid (Hydrogen Fluoride) by Import Volume, 2011
China’s Export Destination Distribution of Hydrofluoric Acid (Hydrogen Fluoride) by Export Volume, 2011
AHF (Anhydrous Hydrogen Fluoride) Price Trend in China, 2008-2012
Capacity of Major Aluminum Fluoride Manufacturers in China, 2011
China’s Export Volume and Value of Aluminum Fluoride, 2008-2012
China’s Average Export Price of Aluminum Fluoride, 2008-2012
China’s Export Destination Distribution of Aluminum Fluoride by Export Volume, 2011
Anhydrous Aluminum Fluoride Price Trend in China, 2008-2012
Performance Comparison between Lithium Hexafluorophosphate and Other Electrolytes
Capacity of World’s Biggest Lithium Hexafluorophosphate Manufacturers and Proportion, 2011
Capacity of Major Lithium Hexafluorophosphate Manufacturers in China, 2011-2015
Revenue and Net Income of Zhejiang Juhua, 2008-2012
Revenue Breakdown of Zhejiang Juhua by Product, 2010-2012
Revenue Structure of Zhejiang Juhua by Product, 2010-2012
Revenue Breakdown of Zhejiang Juhua by Region, 2010-2012
Revenue Structure of Zhejiang Juhua by Region, 2010-2012
Gross Margin of Main Products of Zhejiang Juhua, 2008-2012
Zhejiang Juhua’s Revenue from Top 5 Clients and % of Total Revenue, 2009-2012

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Name List and Revenue Contribution of Zhejiang Juhua's Top 5 Clients, H1 2012
Zhejiang Juhua's Procurement from Top 5 Suppliers and % of Total Procurement, 2009-2011
Fluorine Chemical-related Products of Zhejiang Juhua
Total Assets and Net Income of Fluorine Chemical-related Subsidiaries of Zhejiang Juhua, 2011
Revenue and Net Income of Zhejiang Juhua, 2010-2014
Revenue and Net Income of Do-Fluoride Chemicals, 2008-2012
Revenue Breakdown of Do-Fluoride Chemicals by Product, 2010-2012
Revenue Structure of Do-Fluoride Chemicals by Product, 2010-2012
Revenue Breakdown of Do-Fluoride Chemicals by Region, 2010-2012
Revenue Structure of Do-Fluoride Chemicals by Region, 2010-2012
Gross Margin of Main Products of Do-Fluoride Chemicals, 2010-2012
Fluoride Sales Volume of Do-Fluoride Chemicals, 2009-2012
Status of Projects under Construction of Do-Fluoride Chemicals by June 30, 2012
Revenue and Net Income of Do-Fluoride Chemicals, 2010-2014
Revenue and Net Income of Shanghai 3F New Material, 2008-2012
Revenue Breakdown of Shanghai 3F New Material by Product, 2010-2012
Revenue Structure of Shanghai 3F New Material by Product, 2010-2012
Revenue Breakdown of Shanghai 3F New Material by Region, 2010-2012
Revenue Structure of Shanghai 3F New Material by Region, 2010-2012
Gross Margin of Main Products of Shanghai 3F New Material, 2008-2012
Shanghai 3F New Material's Revenue from Top 5 Clients and % of Total Revenue, 2009-2012
Name List and Revenue Contribution of Shanghai 3F New Material's Top 5 Clients, H1 2012
Purpose of Main Products of Shanghai 3F New Material
Revenue and Net Income of Changshu 3F Fluorochemical Industry, 2009-2011
Revenue and Net Income of Zhonghao New Chemical Materials, 2009-2011
Revenue and Net Income of Shanghai 3F New Material, 2010-2014
Revenue and Net Income of Zhejiang Yongtai Technology, 2008-2012
Revenue Breakdown of Zhejiang Yongtai Technology by Product, 2010-2012
Revenue Structure of Zhejiang Yongtai Technology by Product, 2010-2012
Revenue Breakdown of Zhejiang Yongtai Technology by Region, 2010-2012
Revenue Structure of Zhejiang Yongtai Technology by Region, 2010-2012
Gross Margin of Main Products of Zhejiang Yongtai Technology, 2009-2012
R&D Costs and % of Total Revenue of Zhejiang Yongtai Technology, 2009-2011
Application Fields of Top Fluorine Fine Chemicals of Zhejiang Yongtai Technology
Revenue and Net Income of Zhejiang Yongtai Technology, 2010-2014

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