

China Printing and Dyeing Auxiliary Industry Report, 2012-2015

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Abstracts

Printing and dyeing auxiliaries refer to the auxiliary chemicals added during textile printing and dyeing to improve the processing technology, operational efficiency, textile quality and performance. Printing and dyeing auxiliaries fall into the category of textile auxiliaries, with major varieties including leveling agent, defoamer, dispersant, binding agent, fixing agent, etc.

Since 1990, with the rise in the cost of labor and pollution control in the United States and Europe, the global printing and dyeing industry has gradually transferred from the United States, Western Europe and Japan to the developing countries in the Asia-Pacific region. At present, the Asia-Pacific region is already the world's largest producing area of printing and dyeing auxiliaries.

In 2006-2012, China's printing and dyeing auxiliary output generally showed an upward trend, with a CAGR of 8.8%. In 2012, the output was 1.346 million tons, accounting for about 30% of the global output. China's printing and dyeing auxiliary industry has a self-sufficiency rate of over 85%, but still relies heavily on the import of dedicated and high-end printing and dyeing auxiliaries.

There are 2,000-3,000 printing and dyeing auxiliary producers in China. The market is highly fragmented, private enterprises occupy a dominant position, while joint ventures and foreign wholly-owned enterprises each hold about 10%. Zhejiang Transfar and Dymatic Chemicals are leading enterprises in China's printing and dyeing auxiliary industry, with an annual capacity of 160 kilotons and 130 kilotons in 2012 respectively. With the accelerated structural adjustment of China's printing and dyeing auxiliary industry, high-end, eco-friendly textile auxiliaries have become the key to the sustainable development of the industry, and the foreign-funded enterprises and

domestic leading enterprises with advanced production technology and strong R&D strength have obvious advantage.

As printing and dyeing auxiliaries are used for textile printing and dyeing, the development and prosperity of the printing and dyeing industry directly affect the market of printing and dyeing auxiliaries. In 2006-2012, China's printing and dyeing cloth output maintained a CAGR of 4.7%, and reached 56.6 billion meters in 2012. China's printing and dyeing cloth production is quite concentrated, with top five producing regions (Zhejiang, Fujian, Jiangsu, Guangdong and Shandong) accounting for more than 90% of the national output.

There are many enterprises in China's printing and dyeing industry, and the market competition is intense. Since 2010, China has accelerated the elimination of small and backward printing and dyeing enterprises, gradually enhancing the industry concentration. At present, Hangmin, Zhonghe and Sanfangxiang are major enterprises in China's printing and dyeing industry. Hangmin is an industry leader in terms of production technology, capacity and R & D capabilities.

China Printing and Dyeing Auxiliary Industry Report, 2012-2015 of ResearchInChina includes the following contents:

Policy, supply and demand, competition pattern, import and export, and development forecast of China printing and dyeing auxiliary industry;

Operation, supply and demand, investment, import and export, and development forecast of China printing and dyeing industry;

Operation, printing and dyeing auxiliary business, and development forecast of nine printing and dyeing auxiliary producers in China;

Operation, printing and dyeing business, and development forecast of three printing and dyeing enterprises in China.

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