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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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Contents

1. OVERVIEW OF PRINTING AND DYEING AUXILIARY INDUSTRY

1.1 Definition and Application
1.2 Classification
1.3 Industry Chain
1.4 Industry Overview

2. CHINA PRINTING AND DYEING AUXILIARY INDUSTRY

2.1 Development Status
2.2 Policy Environment
2.3 Supply and Demand
2.4 Competition Pattern
2.5 Import and Export
2.6 Development and Forecast
  2.6.1 Development Trend
  2.6.2 Supply and Demand Forecast

3. ECONOMIC OPERATION OF CHINA PRINTING AND DYEING INDUSTRY

3.1 Operation
3.2 Supply
3.3 Investment
3.4 Import and Export
3.5 Development and Forecast
  3.5.1 Development Trend
  3.5.2 Supply Forecast

4. KEY ENTERPRISES

4.1 Zhejiang Transfar Co., Ltd.
  4.1.1 Profile
  4.1.2 Operation
  4.1.3 Revenue Structure
  4.1.4 Gross Margin
  4.1.5 Customers
  4.1.6 Printing and Dyeing Auxiliary Business

4.1.7 Forecast and Prospect
4.2 Dymatic Chemicals Inc.
4.2.1 Profile
4.2.2 Operation
4.2.3 Revenue Structure
4.2.4 Gross Margin
4.2.5 Customers and Suppliers
4.2.6 Printing and Dyeing Auxiliary Business
4.2.7 Forecast and Prospect
4.3 Zhejiang Longsheng Group Co., Ltd.
4.3.1 Profile
4.3.2 Operation
4.3.3 Revenue Structure
4.3.4 Gross Margin
4.3.5 Customers
4.3.6 Printing and Dyeing Auxiliary Business
4.3.7 Forecast and Prospect
4.4 Zhejiang Runtu Co., Ltd.
4.4.1 Profile
4.4.2 Operation
4.4.3 Revenue Structure
4.4.4 Gross Margin
4.4.5 Customers
4.4.6 Printing and Dyeing Auxiliary Business
4.4.7 Forecast and Prospect
4.5 Shanghai Anoky Textile Chem Co., Ltd.
4.5.1 Profile
4.5.2 Operation
4.5.3 Revenue Structure
4.5.4 Gross Margin
4.5.5 Customers
4.5.6 Printing and Dyeing Auxiliary Business
4.5.7 Forecast and Prospect
4.6 Zhejiang Hangmin Co., Ltd.
4.6.1 Profile
4.6.2 Operation
4.6.3 Revenue Structure
4.6.4 Gross Margin
4.6.5 Customers

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4.6.6 Printing and Dyeing Business
4.6.7 Forecast and Prospect
4.7 Zhonghe Co., Ltd.
4.7.1 Profile
4.7.2 Operation
4.7.3 Revenue Structure
4.7.4 Gross Margin
4.7.5 Printing and Dyeing Business
4.7.6 Forecast and Prospect
4.8 Jiangsu Sanfangxiang Industry Co., Ltd.
4.8.1 Profile
4.8.2 Operation
4.8.3 Revenue Structure
4.8.4 Gross Margin
4.8.5 Printing and Dyeing Business
4.8.6 Forecast and Prospect
4.9 Sunichem Group
4.9.1 Profile
4.9.2 Operation
4.9.3 Printing and Dyeing Auxiliary Business
4.10 Hangzhou Meigao Huayi Chemical Co., Ltd. (MG Chemical)
4.10.1 Profile
4.10.2 Operation
4.10.3 Printing and Dyeing Auxiliary Business
4.11 Shanghai Daxiang Chemical Industry Co., Ltd.
4.11.1 Profile
4.11.2 Operation
4.11.3 Printing and Dyeing Auxiliary Business
4.12 Zhejiang Hongda Chemicals Co., Ltd.

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Selected Charts

SELECTED CHARTS

Textile Auxiliary Classification and Main Products
Printing and Dyeing Auxiliary Products and Applications
Printing and Dyeing Auxiliary Industry Chain
China Textile Auxiliary Output Structure by Variety, 2012
China Printing and Dyeing Auxiliary Output and YoY Growth Rate, 2006-2012
Major Enterprises and Their Capacities of China Printing and Dyeing Auxiliary Industry, 2012
China Textile Auxiliary Import and Export Volume, 2008-2012
China Textile Auxiliary Import and Export Prices, 2008-2012
China Textile Auxiliary Import Source Structure (by Import Volume), 2012
China Textile Auxiliary Export Destination Structure (by Export Volume), 2012
China Textile Auxiliary Import Volume by City, 2012
China Textile Auxiliary Export Volume by City, 2012
China Printing and Dyeing Auxiliary Output, 2012-2016E
Operating Revenue and Growth Rate of China Printing and Dyeing Industry, 2006-2012
Operating Revenue Structure of China Printing and Dyeing Industry (by Product), 2010-2012
Total Profit and Growth Rate of China Printing and Dyeing Industry, 2006-2012
Profit Structure of China Printing and Dyeing Industry (by Product), 2010-2012
China Printing and Dyeing Cloth Output and Growth Rate, 2006-2012
China Printing and Dyeing Cloth Output Structure (by Region), 2012
China Printing and Dyeing Industry Investment, 2010-2012
Import and Export Volume, Value and Average Prices of Printing and Dyeing Products of China, 2012
Export Volume and Value of Printing and Dyeing Products of China, 2010-2012
Export Volume, Export Value and Average Prices of Six Categories of Printing and Dyeing Products of China, 2011
China Printing and Dyeing Product Export Destination Structure (by Export Volume), 2011
China Printing and Dyeing Cloth Output, 2012-2016E
Product Series of Transfar
Revenue and Net Income of Transfar, 2008-2012
Revenue of Transfar by Product, 2010-2012
Revenue Structure of Transfar by Product, 2010-2012
Revenue of Transfar by Region, 2010-2012

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Revenue Structure of Transfar by Region, 2010-2012
Gross Margin of Transfar by Product, 2008-2012
Printing and Dyeing Auxiliary Product Classification of Transfar
Printing and Dyeing Auxiliary Related Subsidiaries and Their Main Businesses of Transfar, 2012
Revenue and Net Income of Printing and Dyeing Auxiliary Related Subsidiaries of Transfar, 2012
Revenue and Net Income of Transfar, 2011-2015E
Revenue and Net Income of Dymatic Chemicals, 2008-2012
Revenue of Dymatic Chemicals by Product, 2010-2012
Revenue Structure of Dymatic Chemicals by Product, 2010-2012
Revenue of Dymatic Chemicals by Region, 2010-2012
Revenue Structure of Dymatic Chemicals by Region, 2010-2012
Gross Margin of Dymatic Chemicals by Product, 2008-2012
Procurement of Dymatic Chemicals from Top 5 Suppliers, 2009-2012
Name List, Procurement and % of Top 5 Suppliers of Dymatic Chemicals, 2012
Printing and Dyeing Auxiliary Products of Dymatic Chemicals
Revenue and Net Income of Dymatic Chemicals, 2011-2015E
Main Businesses of Zhejiang Longsheng
Revenue and Net Income of Zhejiang Longsheng, 2008-2012
Revenue of Zhejiang Longsheng by Product, 2010-2012
Revenue Structure of Zhejiang Longsheng by Product, 2010-2012
Revenue of Zhejiang Longsheng by Region, 2010-2012
Revenue Structure of Zhejiang Longsheng by Region, 2010-2012
Gross Margin of Dye Products of Zhejiang Longsheng, 2008-2012
Revenue and Net Income of Dymatic Chemicals, 2011-2015E
Main Businesses and Products of Zhejiang Runtu
Revenue and Net Income of Zhejiang Runtu, 2008-2012
Revenue of Zhejiang Runtu by Product, 2010-2012
Revenue Structure of Zhejiang Runtu by Product, 2010-2012
Revenue of Zhejiang Runtu by Region, 2010-2012
Revenue Structure of Zhejiang Runtu by Region, 2010-2012
Gross Margin of Zhejiang Runtu by Product, 2009-2012
Printing and Dyeing Auxiliary Related Subsidiaries and Main Businesses of Zhejiang Runtu, 2012
Revenue and Net Income of Zhejiang Runtu, 2011-2015E
Main Businesses and Products of Anoky
Revenue and Net Income of Anoky, 2008-2012
Revenue of Anoky by Product, 2010-2012

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Revenue Structure of Anoky by Product, 2010-2012
Revenue of Anoky by Region, 2010-2012
Revenue Structure of Anoky by Region, 2010-2012
Gross Margin of Anoky by Product, 2010-2012
Auxiliary Related Subsidiaries and Their Main Businesses of Anoky, 2012
Revenue and Net Income of Yantai Anoky, 2010-2012
Revenue and Net Income of Anoky, 2011-2015E
Revenue and Net Income of Hangmin, 2008-2012
Revenue of Hangmin by Product, 2010-2012
Revenue Structure of Hangmin by Product, 2010-2012
Revenue of Hangmin by Region, 2010-2012
Revenue Structure of Hangmin by Region, 2010-2012
Gross Margin of Printing and Dyeing Products of Hangmin, 2008-2012
Sales and Net Income of Printing and Dyeing Related Subsidiaries of Hangmin, 2012
Revenue and Net Income of Hangmin, 2011-2015E
Revenue and Net Income of Zhonghe, 2008-2012
Revenue of Zhonghe by Product, 2010-2012
Revenue Structure of Zhonghe by Product, 2010-2012
Revenue of Zhonghe by Region, 2010-2012
Revenue Structure of Zhonghe by Region, 2010-2012
Gross Margin of Textile Printing and Dyeing Business of Zhonghe, 2008-2012
Net Income of Xiamen Hualun Printing & Dyeing, 2008-2012
Revenue and Net Income of Zhonghe, 2011-2015E
Revenue and Net Income of Sanfangxiang, 2008-2012
Revenue of Sanfangxiang by Product, 2010-2012
Revenue Structure of Sanfangxiang by Product, 2010-2012
Revenue of Sanfangxiang by Region, 2010-2012
Revenue Structure of Sanfangxiang by Region, 2010-2012
Gross Margin of Sanfangxiang by Product, 2008-2012
Printing and Dyeing Cloth and Cotton Yarn Output of Sanfangxiang, 2010-2012
Revenue and Net Income of Sanfangxiang, 2011-2015E
Operating Revenue and Total Profit of Sunichem, 2008-2009
Printing and Dyeing Auxiliary Classification and Products of Sunichem
Printing and Dyeing Auxiliary Business Development History of Sunichem
Operating Revenue and Total Profit of MG Chemical, 2008-2009
Printing and Dyeing Auxiliary Product Series of MG Chemical
Operating Revenue and Total Profit of Daxiang Chemical, 2008-2009
Printing and Dyeing Auxiliary Product Series of Hongda Chemicals

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