

China BDO-PTMEG-Spandex Industry Chain Report, 2012-2015

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Abstracts

Concerning China's spandex industry from 2011 to the first half of 2012, on the one hand, capacity expansion continued; on the other hand, the demand from downstream sectors plunged into the doldrums, which caused a decrease in spandex price, as well as a substantial decline in business performance of major manufacturers. In 2011, spandex output of China approximated 260,000 tons, a year-on-year decrease of 4.6%; apparent consumption dropped by 1.7% YoY to 250,000 tons or so.

In 2011, China's spandex capacity reached 407,000 tons, accounting for more than 60% of the global total, which also made China the most significant spandex consumer market around the globe. In H1 2012, new spandex production capacity in China exceeded 40,000 tons, and it is expected to hit 470,000 tons for the whole year, then followed by a sharp reduction from 2013, whereupon the industry will step into the capacity digestion phase, accompanied by a possibly better supply-demand pattern.

As important upstream materials for spandex, PTMEG and pure MDI in 2011 kept high market prices as a whole, thus exerting greater cost pressure on spandex manufacturers. Downstream consumers of spandex refer to textile and garment, whose output growth plus with the ever-improving spandex utilization proportion owing to consumption upgrading constitute the leading causes to promote demand growth for spandex.

Spandex industry features a relatively high concentration degree in China, the key players include Zhejiang Huafon Spandex Co., Ltd., South Korea's Hyosung, Zhuji Huahai Spandex Co., Ltd., United States-based INVISTA, Sichuan Youli Investment Holding Co., Ltd., Yantai Tayho Advanced Materials Co., Ltd., etc.. In 2011, spandex capacity of China spandex industry's top seven producers altogether occupied 65.2%

of the national total. Moreover, leading companies are still expanding their spandex capacity, oriented by differentiated products.

In April 2012, Zhejiang Huafon Spandex's 15,000 t/a High Temperature Thin Fabric Spandex Project was completed and put into operation, with total capacity up to 57,000 tons, thus surpassing Hyosung to again be China's largest spandex enterprise; the under-construction 7,000 tons/a Comfortable Spandex Project of Yantai Tayho Advanced Materials Co., Ltd., expected to go into operation at the end of 2012, will realize total capacity of 37,000 tons per year.

China BDO-PTMEG-Spandex Industry Chain Report, 2012-2015 of ResearchInChina chiefly covers the followings:

Capacity, supply & demand, price trend, competitive landscape, import & export as well as development forecast of spandex industry in China;

Capacity, supply & demand, import & export, price trend, etc. of upstream Industries of spandex in China such as PTMEG, MDI, BDO;

Output, operation, import & export, etc. of downstream textile industry of spandex in China;

Operation, spandex business, development forecast, etc. of 14 Chinese spandex producers.

Contents

1. OVERVIEW OF SPANDEX INDUSTRY

- 1.1 Definition and Application
- 1.2 Industrial Chain
- 1.3 Technology

2. CHINA SPANDEX MARKET

- 2.1 Development
- 2.2 Supply and Demand
 - 2.2.1 Capacity
 - 2.2.2 Output
 - 2.2.3 Demand
- 2.3 Price
- 2.4 Competitive Landscape
- 2.5 Import and Export
 - 2.5.1 Spandex Single Yarn
 - 2.5.2 Spandex Yarn
- 2.6 Development Forecast

3. DEVELOPMENT OF UPSTREAM INDUSTRIES OF SPANDEX IN CHINA

- 3.1 PTMEG Market
 - 3.1.1 Supply
 - 3.1.2 Demand
 - 3.1.3 Import and Export
 - 3.1.4 Price
- 3.2 MDI Market
 - 3.2.1 Supply
 - 3.2.2 Demand
 - 3.2.3 Import and Export
 - 3.2.4 Price
- 3.3 BDO Market
 - 3.3.1 Supply
 - 3.3.2 Demand
 - 3.3.3 Competitive Landscape
 - 3.3.4 Import and Export

3.3.5 Price

3.3.6 Development Prospects and Trends

4. DEVELOPMENT OF DOWNSTREAM INDUSTRIES OF SPANDEX IN CHINA

4.1 Development Status

4.2 Industrial Operation

4.3 Import and Export

4.4 Development Outlook

5. KEY ENTERPRISES IN CHINA

5.1 Zhejiang Huafon Spandex

5.1.1 Profile

5.1.2 Operation

5.1.3 Revenue Structure

5.1.4 Gross Margin

5.1.5 Clients and Suppliers

5.1.6 R & D

5.1.7 Spandex Business

5.1.8 Forecast and Prospects

5.2 Hyosung (China)

5.2.1 Profile

5.2.2 Operation

5.2.3 Spandex Business

5.2.4 Business in China

5.3 INVISTA (China)

5.3.1 Profile

5.3.2 Business in China

5.4 Sichuan Youli Investment Holding

5.4.1 Profile

5.4.2 Operation

5.4.3 Revenue Structure

5.4.4 Spandex Business

5.4.5 Forecast and Prospects

5.5 Yantai Tayho Advanced Materials

5.5.1 Profile

5.5.2 Operation

5.5.3 Revenue Structure

- 5.5.4 Gross Margin
- 5.5.5 R & D
- 5.5.6 Spandex Business
- 5.5.7 Forecast and Prospects
- 5.6 Taekwang Synthetic Fiber
 - 5.6.1 Profile
 - 5.6.2 Operation and Development
- 5.7 EBH Spandex
 - 5.7.1 Profile
 - 5.7.2 Operation
- 5.8 Xinxiang Chemical Fibre
 - 5.8.1 Profile
 - 5.8.2 Operation
 - 5.8.3 Revenue Structure
 - 5.8.4 Gross Margin
 - 5.8.5 Spandex Business
 - 5.8.6 Forecast and Prospects
- 5.9 Hangzhou Banglian Spandex
 - 5.9.1 Profile
 - 5.9.2 Operation and Development
- 5.10 Hangzhou Sunrise Spandex
 - 5.10.1 Profile
 - 5.10.2 Operation
- 5.11 Zhejiang Yadi Fiber
 - 5.11.1 Profile
 - 5.11.2 Operation and Development
- 5.12 Zhejiang Sihai Spandex Fiber
 - 5.12.1 Profile
 - 5.12.2 Operation
- 5.13 Zhejiang Shei Yung Hsin Spandex
 - 5.13.1 Profile
 - 5.13.2 Operation and Development
- 5.14 Hangzhou Asahikasei Spandex
 - 5.14.1 Profile
 - 5.14.2 Operation

Selected Charts

SELECTED CHARTS

Output Structure of Major Varieties of Synthetic Fiber in China, 2011
Classification and Application Terminals of Spandex
Spandex Industry Chain
Advantages & Disadvantages of Spandex Process Route
Capacity of Leading Spandex Manufacturers in China, 2010-2011
Spandex Projects under Construction or Planned in China, 2012
Spandex Output and YoY Growth Rate in China, 2008-2012
China's Spandex Output by Region, 2011
Apparent Consumption of Spandex and YoY Growth Rate in China, 2008-2012
Market Price Trends of Spandex 40D in China, 2006-2012
Capacity Structure of Leading Spandex Manufacturers in China, 2011
Import / Export Volume of Spandex Single Yarn in China, 2008-2012
Average Import / Export Price of Spandex Single Yarn in China, 2008-2012
Import Source Structure of Spandex Single Yarn in China, 2011
Export Destinations of China-made Spandex Single Yarn, 2011
Import / Export Volume of Spandex Yarn in China, 2008-2012
Average Import / Export Price of Spandex Yarn in China, 2008-2012
Import Source Structure of Spandex Yarn in China (by Import Volume), 2011
Export Destinations of China-made Spandex Yarn (by Export Volume), 2011
Capacity and Operating Rate of Spandex in China, 2011-2015E
Output and Apparent Consumption of Spandex in China, 2011-2015
Output, Capacity and Operating Rate of PTMEG in China, 2006-2012
Capacity of PTMEG Manufacturers in Mainland China, 2011
PTMEG Projects Planned or under Construction in China, 2012
Apparent Consumption and Import Dependence Ratio of PTMEG in China, 2006-2012
PTMEG Consumption Structure in China, 2011
Import / Export Volume of PTMEG in China, 2008-2012
Average Import / Export Price of PTMEG in China, 2008-2012
Import Source Structure of PTMEG in China (by Import Volume), 2011
Export Destinations of PTMEG in China (by Export Volume), 2011
PTMEG (1800 Molecular Weight) Price in East China Market, 2008-2011
Capacity of Main MDI Enterprises in China, 2008-2011
New MDI Capacity in China, 2012-2016
Demand and YoY Growth Rate of Pure MDI in China, 2008-2012
Consumption Structure of Pure MDI in China, 2011

Import / Export Volume of Pure MDI in China, 2008-2012
Average Import / Export Price of Pure MDI in China, 2008-2012
Import Source Structure of Pure MDI in China (by Import Volume), 2011
Export Destinations of Pure MDI in China (by Export Volume), 2011
Monthly Price Average of Pure MDI in China, 2010-2012
Capacity of BDO Manufacturers in China, 2011
New BDO Capacity in China, 2012-2015
Capacity, Output and Operating Rate of BDO in China, 2006-2012
Apparent Demand of BDO in China, 2006-2012
China's BDO Consumption Structure by Field, 2011
Capacity Structure of BDO Manufacturers in China, 2011
Import / Export Volume of Other Dibasic Alcohols in China, 2007-2012
Import Volume of BDO in China, 2006-2011
Import Source Structure of Other Dibasic Alcohols in China (by Import Volume), 2011
Export Destinations of Other Dibasic Alcohols in China (by Export Volume), 2011
Average BDO Price in East China Market, 2009-2012
Yarn Output and YoY Growth Rate in China, 2006-2012
Fabric Output and YoY Growth Rate in China, 2006-2012
Number of Textile Enterprises in China, 2006-2012
Operating Revenue and YoY Growth Rate of Textile Industry in China, 2006-2012
Total Profit and YoY Growth Rate of China Textile Industry, 2006-2012
Import / Export Value of Textile Yarn, Fabric and Related Products in China, 2007-2012
Revenue and Net Income of Zhejiang Huafon Spandex, 2008-2012
Revenue Breakdown of Zhejiang Huafon Spandex by Products, 2010-2012
Revenue Structure of Zhejiang Huafon Spandex by Products, 2010-2012
Revenue Breakdown of Zhejiang Huafon Spandex by Regions, 2010-2012
Revenue Structure of Zhejiang Huafon Spandex by Regions, 2010-2012
Gross Margin of Spandex Business of Zhejiang Huafon Spandex, 2008-2012
Zhejiang Huafon Spandex's Revenue from Top 5 Clients and % of Total Revenue, 2009-2012
Name List and Revenue Contribution of Zhejiang Huafon Spandex's Top 5 Clients, H1 2012
Zhejiang Huafon Spandex's Procurement from Top 5 Suppliers and % of Total Procurement, 2009-2011
R&D Costs and % of Total Revenue of Zhejiang Huafon Spandex, 2009-2011
Revenue and Net Income of Zhejiang Huafon Spandex, 2010-2014E
Primary Business of Hyosung's 8 Major Business Divisions
Revenue and Net Income of Hyosung, 2007-2011
Revenue and Operating Income of Hyosung's Textile Sector, 2008-2011

Performance of Main Spandex Products of Hyosung

Operating Revenue and Operating Income of Hyosung (Jiaxing), 2007-2009

Operating Revenue and Operating Income of Hyosung (Guangdong), 2007-2009

Operating Revenue Structure of Spandex Business of Hyosung (China), 2008

Gross Margin of Hyosung Spandex (Jiaxing), Hyosung Spandex (Guangdong) and Hyosung Spandex (Zhuhai), 2008

Business Divisions and Main Products of INVISTA

Operating revenue, Operating Income and Gross Margin of INVISTA China Branch, 2009

Operating Revenue, Operating Income and Gross Margin of INVISTA Fibers, 2007-2009

Operating Revenue, Operating Income and Gross Margin of INVISTA Fibers (Shanghai), 2007-2009

Operating Revenue, Operating Income and Gross Margin of INVISTA Fibers (Foshan), 2007-2009

Revenue and Net Income of Sichuan Youli Investment Holding, 2008-2012

Revenue Breakdown of Sichuan Youli Investment Holding by Products, 2010-2012

Revenue Structure of Sichuan Youli Investment Holding by Products, 2010-2012

Revenue Breakdown of Sichuan Youli Investment Holding by Regions, 2010-2012

Revenue Structure of Sichuan Youli Investment Holding by Regions, 2010-2012

Total Assets and Net Income of Spandex Related Subsidiaries of Sichuan Youli Investment Holding, 2011

Revenue and Net Income of Sichuan Youli Investment Holding, 2010-2014E

Revenue and Net Income of Yantai Tayho Advanced Materials, 2008-2012

Revenue Breakdown of Yantai Tayho Advanced Materials by Products, 2010-2012

Revenue Structure of Yantai Tayho Advanced Materials by Products, 2010-2012

Revenue Breakdown of Yantai Tayho Advanced Materials by Regions, 2010-2012

Revenue Structure of Yantai Tayho Advanced Materials by Regions, 2010-2012

Gross Margin of Major Products of Yantai Tayho Advanced Materials, 2008-2012

R&D Costs and % of Total Revenue of Yantai Tayho Advanced Materials, 2009-2011

Revenue and Net Income of Yantai Tayho Advanced Materials, 2010-2014E

Operating Revenue, Total Profit and Gross Margin of Taekwang Synthetic Fiber, 2007-2009

Operating Revenue, Total Profit and Gross Margin of EBH Spandex, 2007-2009

Capacity of Xinxiang Chemical Fibre, 2011

Revenue and Net Income of Xinxiang Chemical Fibre, 2008-2012

Revenue Breakdown of Xinxiang Chemical Fibre by Products, 2010-2012

Revenue Structure of Xinxiang Chemical Fibre by Products, 2010-2012

Revenue Breakdown of Xinxiang Chemical Fibre by Regions, 2010-2012

Revenue Structure of Xinxiang Chemical Fibre by Regions, 2010-2012
Gross Margin of Major Products of Xinxiang Chemical Fibre, 2008-2012
Spandex Output of Xinxiang Chemical Fibre, 2008-2012
Projects under Construction of Xinxiang Chemical Fibre by June 2012
Revenue and Net Income of Xinxiang Chemical Fibre, 2010-2014E
Operating Revenue, Total Profit and Gross Margin of Hangzhou Banglian Spandex, 2007-2009
Operating Revenue, Total Profit and Gross Margin of Hangzhou Sunrise Spandex, 2007-2009
Operating Revenue, Total Profit and Gross Margin of Zhejiang Yadi Fiber, 2008-2009
Revenue and Operating Income of Zhejiang Sihai Spandex Fiber, 2009-2011
Gross Margin of Sihai's Textile Business, 2009-2012
Operating Revenue, Total Profit and Gross Margin of Zhejiang Shei Yung Hsin Spandex, 2007-2009
Operating Revenue, Total Profit and Gross Margin of Hangzhou Asahikasei Spandex, 2007-2009

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