

China Hydrofluoric Acid Industry Report, 2009-2010

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Abstracts

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At present, fluorite and sulfuric acid are the main reactants to produce hydrofluoric acid, and more than half of the world's fluorite reserves are for the production of hydrofluoric acid. The proven reserves of fluorite in China approximate 140 million tons currently, ranking the top worldwide and featuring high convergence. Thanks to its abundance of fluorite resources, China is playing an important role in hydrofluoric acid industry across the world.

The growing tight supply of fluorite resources forced the tycoons in fluorine chemical industry, including SOLVAY, Arkema, Stella, Morita, Dai kin Industries and INEOS, to transfer the production of hydrofluoric acid to China, and established their plants there successively. As of the end of 2009, there were over 60 hydrofluoric acid manufacturers (all state-run enterprises and non-state enterprises with an annual sales income of more than RMB5 million) in China, with the total capacity of around 1.22 million tons. However, due to the weakened demand in the downstream, the hydrofluoric acid output of China was just 600,000 tons or so in 2009, with an operating rate of less than 50%.

China limits the building of new projects with hydrogen fluoride production equipment (excluding corollary equipment for own use and electronic high-purity hydrogen fluoride equipment) with single set yielding below 10,000 tons/year. Out of consideration for scale economy, there has over 75% of hydrofluoric acid manufacturers in China with the annual capacity surpassing 10,000 tons. With the developing technology and weakening industrial entry barriers, the industrial concentration will become much lower in the wake of the increasing entrants in this field. In 2009, Zhejiang YingPeng Group, the largest hydrofluoric acid manufacturer in China, contributed to 11.1% capacity of the

total, followed by Shandong Dong Yue Group, Fujian Shaowu Yongfei Chemical Industry Co., Ltd and Zhejiang Sanmei Chemical Industry Co., Ltd with the capacity percentage of 6.6%, 4.2% and 4.1% respectively. And the figures of other enterprises in the industry were all below 4%.

In addition, the electronic-grade hydrofluoric acid of China is limited in terms of both capacity and output by reason of technical barriers. Since 2009, two 1,000-ton-above projects have put into production successively in China, referring to 6,000 tons/year electronic-grade hydrofluoric acid project of Zhejiang Kaiheng Electronic Materials Co., Ltd and 3,000 tons/year electronic-grade hydrofluoric acid project of Fujian Shaowu Yongfei Chemical Industry Co., Ltd. However, the recovery of electronic industry worldwide stimulated the growing demand for electronic-grade hydrofluoric acid. Thus far, China's hydrofluoric acid capacity has yet failed to satisfy the domestic market. As of the first half of 2010, the capacity of electronic-grade hydrofluoric acid in China only provided 1.1% of the total roughly. Therefore, China has to meet the domestic demand for hydrofluoric acid through imports.

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