

China Organic Silicon Industry Report, 2009-2010



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In 2009, capacity utilization of China's organic silicon industry was only 50% due to low market prices of organic silicon. The demand and supply in Chinese market of organic silicon monomer is still in balance, as the output capacity and apparent consumption respectively reaches 1.09 million tons and 1.10 million tons. As yet, foreign companies, Bluestar New Chemical Materials Co., Ltd and Zhejiang Wynca Chemical Group Co., Ltd have dominated China's medium and high-end organic silicon monomer market, and the other companies are all in low-end market competition. In the upcoming years, Chinese organic silicon monomer market will witness increasingly competition since the rapid spreading of organic silicon monomer technologies domestically.

Organic silicon monomer characterizes obvious benefit from production scale, yet there is a big gap of Chinese organic silicon producers to foreign counterparts. Currently, the total output capacity of organic silicon monomer of the global top four organic silicon giants accounts for 65.5% of the world's total, and just Dow Corning itself covers around 28%, reaching 860,000 tons a year. However, only a few companies like Wynca Chemical, Bluestar New Chemical Materials and Shandong Jinling can achieve mass-production of monomer, 100,000 tons and above, but still at lower level of scale production.

China's Organic Silicon Deep-processed Products Layout, 2009

When leading companies are conducting upstream and downstream integration, the production scale of organic silicon deep-processed products in China will maintain rapid growth. In 2009, the output of silicone rubber and silicone oil took a 95% share of China's total output of organic silicon deep-processed products; wherein, the output capacity and output of room-temperature silicone rubber approximated 350,000 tons and 260,000 tons, respectively, and the output capacity of high-temperature silicone rubber was 220,000 tons.

At present, downstream product deep-processing has much better profitability than such upstream products as monomer and intermediates. For instance, in 2009, the profitability of downstream firms such as Guibao Technology and Huitian Adhesive was far higher than upstream ones like Bluestar New Chemical Materials with large monomer output capacity.

Table of Content

1 OVERVIEW OF ORGANIC SILICON INDUSTRY

1.1 Performance of Organic Silicon

1.1.1 Temperature Resistance

1.1.2 Weather Resistance

1.1.3 Electrical Insulation

1.1.4 Physiological Inertia

1.1.5 Low Surface Tension & Low Surface Energy

- 1.2 Development Stages
- 1.3 Industry Chain
 - 1.3.1 Organic Silicon Materials
 - 1.3.2 Organic Silicon Monomer
 - 1.3.3 Organic Silicon Intermediate
 - 1.3.4 Organic Silicon Products
 - 1.3.5 Applications

2 DEVELOPMENT OF GLOBAL ORGANIC SILICON INDUSTRY

- 2.1 Raw Material Market
- 2.2 Organic Silicon Monomer
- 2.3 Organic Silicon Intermediate
- 2.4 Organic Silicon Downstream Products

3 DEVELOPMENT OF CHINA ORGANIC SILICON INDUSTRY

- 3.1 Raw Material Sector
 - 3.1.1 Metallic Silicon
 - 3.1.2 Glyphosate
 - 3.1.3 Chloromethanes (CMS)
 - 3.1.4 Methanol
- 3.2 Organic Silicon Monomer Sector
 - 3.2.1 Production
 - 3.2.2 Import
- 3.3 Organic Silicon Intermediate Sector
 - 3.3.1 Supply & Demand
 - 3.3.2 Price Trend
- 3.4 Downstream Products
 - 3.4.1 Room-temperature Silicone Rubber
 - 3.4.2 High-temperature Silicone Rubber
 - 3.4.3 Silicone Oil

4 COMPETITION IN ORGANIC SILICON INDUSTRY

- 4.1 Competitiveness of Industry Chain
- 4.2 Market Concentration
- 4.3 Market Competition

5 KEY COMPANIES

- 5.1 Dow Corning
 - 5.1.1 Profile
 - 5.1.2 Operation
 - 5.1.3 Business Expansion in China
- 5.2 Wacker
 - 5.2.1 Profile
 - 5.2.2 Operation
 - 5.2.3 Business Expansion in China
- 5.3 Momentive
 - 5.3.1 Profile
 - 5.3.2 Operation
 - 5.3.3 Business Expansion in China
- 5.4 Shin-Etsu
 - 5.4.1 Profile

- 5.4.2 Operation
- 5.4.3 Business Expansion in China
- 5.5 Bluestar New Chemical Materials
 - 5.5.1 Profile
 - 5.5.2 Operation
 - 5.5.3 Performance
 - 5.5.4 Planning & Investment
- 5.6 Wynca Chemical
 - 5.6.1 Profile
 - 5.6.2 Operation
 - 5.6.3 Performance
 - 5.6.4 Planning & Investment
- 5.7 Hongda New Materials
 - 5.7.1 Profile
 - 5.7.2 Operation
 - 5.7.3 Performance
 - 5.7.4 Planning & Investment
- 5.8 Guibao Technology
 - 5.8.1 Profile
 - 5.8.2 Operation
 - 5.8.3 Performance
 - 5.8.4 Competitive Edge
 - 5.8.5 Planning & Investment
- 5.9 Huitian Adhesive
 - 5.9.1 Profile
 - 5.9.2 Operation
 - 5.9.3 Performance
 - 5.9.4 Competitive Edge
 - 5.9.5 Planning & Investment
- 5.10 Others
 - 5.10.1 Calcium Carbide plant, Jilin Petrochemical Company
 - 5.10.2 Jiangsu Meilan Chemical Group
 - 5.10.3 Zhejiang Hesheng Chemical Group

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