

China PTA Industry Chain Report, 2011-2015

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Abstracts

PTA (pure terephthalic acid) is an important chemical fiber raw material. During 2001-2010, the PTA capacity in China increased rapidly with an AAGR of 23.1%. In 2010, PTA capacity reached 15.79 million tons in China, and the import dependency fell to 30% or so. The capacity is predicted to maintain the growth rate of above 15% in next a few years, and it will be up to above 36 million tons in 2015.

From the aspect of upstream industries, the primary raw material of PTA is PX (paraxylene), and the PX makes up around 85% of the total PTA cost. In 2010, the PX capacity was 9.86 million tons and its apparent consumption reached 11 million tons in China; however, 32% of the PX in China was imported. Due to the dike breach accident of Fujia Dahua in 2011, it is predicted that the examination and approval on PX projects in China will tend to be more stringent and the capacity growth of PX in China may be restrained. It needs 0.66 ton of PX to produce one ton of PTA, then the theoretical demand for PX in China will be nearly 24 million tons in 2015 according to the current PTA capacity planning; by then, the capacity insufficiency may reach up to 4 million tons. In Chinese PTA industrial chain, PX industry will be booming.

From the aspect of downstream industries, more than 90% of PTA is used to produce PET. During 2006-2010, Chinese PET capacity presented an AAGR of 9.3% and the capacity hit 29.3 million tons in 2010. It is expected that Chinese PET capacity will still grow at a rate of 9% in the future, and will exceed 46 million tons in 2015. To produce one ton of PET needs about 0.85-0.86 ton of PTA, then the theoretical demand for PTA in China in 2015 may be approximately 39 million tons. By then, the demand and supply of PTA will be balanced, which is favorable to the development of PTA industry.

The manufacturers in China PTA industry are characterized by large scale, small quantity and high capacity concentration. By the end of June 2011, there had been 19 PTA manufacturers in China; the PTA capacity of top five enterprises had accounted for

53.4% of the total capacity nationwide. As the two larger producers, the PTA capacity of Zhejiang Yisheng and Yisheng Dahua reached 3.3Mt/a and 2.0Mt/a respectively, sharing 17.5% and 10.6% of the total PTA capacity in China separately.

Besides, some Chinese PET manufacturers have extended into upstream sectors and built PTA projects to improve their anti-risk ability and market competitiveness through PX-PTA-PET integration. For instance, the 1.2Mt/a PTA Project jointly constructed by Sanfangxiang Group and Tenglong Group entered the commissioning and trial production stage in September 2011. The 800kt/a PTA Project invested and constructed by Tongkun Group will be completed and put into production in H1 2012.

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