

China White Carbon Black Market Report, 2010-2011

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Abstracts

In recent years, white carbon black industry has presented vigorous development in China. China's output of white carbon black reached 431 thousand tons in 2004 and rocketed to 840 thousand tons in 2010, with capacity and output both ranking No.1 worldwide. It is expected that this growth trend will last until 2013.

Rubber industry, the main consumer of white carbon black, occupies about 74% of the total consumption. In 2009, China's rubber industry consumed 550 thousand tons of white carbon black; specifically, the shoemaking industry consumed 350 thousand tons (47%), tyre market 120 thousand tons (16%), rubber tube, rubber belt and electrical wire & cable market 80 thousand tons (11%). In addition, non-rubber fields including textile, papermaking and pesticide accounted for 190 thousand tons (26%) of the total consumption.

The growth potential of the white carbon black demand from the rubber industry including shoemaking, rubber tube, rubber belt, and electrical wire & cable is limited, on account of mature development in these fields. As for other industries except rubber industry, the demand for white carbon black is scattered and in low absolute quantity. Therefore, the most promising application field of white carbon black will be tyre industry in the coming years.

In 2010, there are more than 50 enterprises directly engaged in precipitated silica production in China, with a total output of 840 thousand tons. Currently, most of the precipitated silica produced in China is ordinary white carbon black, which mainly finds application in tyre and shoemaking industries; high value-added products need to be imported in China.

At present, some enterprises in China are constructing or planning white carbon black projects, such as TongHua ShuangLong Group Chemical Co., Ltd., Do-Fluoride

Chemicals Co., Ltd., and Shandong Haihua Company Limited. Driven by a series of fundraising and investment projects, it is expected that China's output of white carbon black will exceed 1 million tons in 2011.

Now, annual capacity of TongHua ShuangLong reaches 16 thousand tons. Its main product highly dispersed precipitated silica for HTV silicon rubber occupies the largest market share in China, and highly dispersed silica for high-end paints holds the second largest market share. The RMB120.4023 million fundraising project of TongHua ShuangLong will add 20 thousand tons to the company's annual capacity of highly dispersed silica products.

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