

Global and China Aramid Fiber Industry Report, 2015-2018

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Abstracts

Aramid fiber, a new high-tech synthetic fiber, falls into two types: meta-aramid fiber and para-aramid fiber, with the latter is superior to the latter in terms of technical difficulty and performance indicator.

Global aramid fiber capacity has approached 130kt by the end of Oct 2015, mostly distributed in North America, Europe, and Asia. Para-aramid fiber, accounting for about 63% of total global aramid fiber capacity, are primarily used in protection materials, high temperature resistant materials, and rope/optical cable; and meta-aramid fiber is chiefly used in insulation, flame resistance, and filtration fields.

American DuPont and Japanese Teijin are the two major producers of aramid fiber around the globe, holding a combined 63% share of total meta-aramid fiber capacity and 77% of total para-aramid fiber capacity in the world by the end of Oct 2015. 2,200 tons/a of meta-aramid fiber (Thailand factory) was new capacity put into operation by Teijin in Aug 2015.

China is late starter in aramid fiber industry with outdated production technology. The country seized only 15% of the world's total aramid fiber capacity as of the end of Oct 2015.

The supply exceeded the demand in the Chinese meta-aramid fiber market during 2011-2015, particularly in competitive low-end product market. It is predicted that China will produce 12,000 tons of meta-aramid fiber in 2015 with 1,200 tons exported. Para-aramid fiber, on the contrary, has been in short supply and needs to be imported. However, as the output of para-aramid fiber increases, China has reduced its dependency on imports of para-aramid fiber in recent years, with import dependency

expected to fall below 40% in 2015.

Major Chinese meta-aramid fiber producers are Yantai Tayho Advanced Materials and SRO Aramid (Jiangsu), with the former boasting meta-aramid fiber capacity of 7,600 tons and the latter 4,500 tons by the end of Oct 2015. Moreover, Yantai Tayho Advanced Materials is building 1,000 t/a meta-aramid fiber capacity which is expected to go into production in early 2016; SRO Aramid (Jiangsu) plans to put 2,500 t/a meta-aramid fiber capacity into production in 2016.

There are five para-aramid fiber producers in China, respectively Yantai Tayho Advanced Materials, Suzhou Zhaoda Specially Fiber Technical, China BlueStar Chengrand Research & Design Institute of Chemical Industry, Shenma Industry, and Hebei Silicon Valley Chemical. Para-aramid fiber production facilities are not mature in China, and only Yantai Tayho Advanced Materials has stable production lines with annual output of around 500 tons.

Aramid fiber is usually applied to downstream fields in the form of composites. High-end product market is dominated mainly by multinational companies like DuPont and Teijin. Major Chinese producers of aramid fiber composites are Xiamen Savings Environmental (aramid fiber high temperature resistant filtration materials), Yantai Metastar Special Paper (Aramid fiber paper), Yichang Hedali Composite Materials (aramid fiber honeycomb), and Wuxi Boton Technology (aramid fiber conveyer belt).

Global and China Aramid Fiber Industry Report, 2015-2018 highlights the followings:

Supply and demand, competitive landscape, etc. of meta-aramid fiber and para-aramid fiber markets worldwide;

Supply and demand, import & export, competitive landscape, development forecast, etc. of meta-aramid fiber and para-aramid fiber markets in China;

Demand from downstream aramid fiber application fields in China such as high temperature resistant filtration materials, safety & protection, aramid fiber paper, optical cable-reinforced materials, tire cord, etc.;

Operation, aramid fiber-related business, forecast and prospects, etc. of 16 aramid fiber and composite producers at home and abroad.

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