

Global and China Caprolactam Industry Chain Report, 2012-2015

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Abstracts

As one of the key organic chemical materials, caprolactam (CPL) is mainly used to produce polyamide-6, and further fabricated into nylon 6 fiber, nylon 6 engineering plastics, etc.. It is widely applied in the fields such as textile, fishery, tire, engineering plastics, film and composite material.

During 2006-2012, the CPL capacity around the globe maintained steady growth, with a CAGR around 4.9%. Since the CPL market in Europe and America has been saturated basically and the capacity suffers stagnation or even negative growth, the newly added capacity of CPL worldwide mainly concentrates in Asia, especially China. In 2012, the CPL capacity around the globe reached 5.68 million tons, in particular, the capacity ratio of Asia registered 46.3%.

In 2012, the CPL capacity in China amounted to 1.215 million tons, sharing 21.4% of globe's total capacity. Nevertheless, CPL is still undersupplied in China. Currently, China is the largest CPL importer in the world, with a self-sufficiency rate of around 50% only. According to enterprises' public information, the CPL capacity in China is expected to witness an AAGR of over 20% during 2013-2016, and is estimated to reach 2.99 million tons by 2016, with supply and demand achieving balance basically.

The downstream consumption fields of CPL mainly involve nylon fiber and engineering plastics. In 2012, the CPL consumption in China was still restricted in traditional nylon fiber, with proportion achieving 73.3%; the consumption of engineering plastics only shared 19.5% of total, much lower than 38.1% globally. In future, along with the rapid development of such industries as automotive, military and sports equipment in China, the application ratio of CPL in engineering plastics will witness continuous increase.

The industrial concentration of CPL is on the high side around the globe, and the capacity of top five enterprises in 2012 shared 52.2% of total capacity. BASF and DSM are the leading enterprises in CPL industry around the globe, with capacity respectively hitting 785 kilotons and 710 kilotons. In particular, DSM has a CPL production base in Nanjing.

There were only 7 CPL manufacturers in China in 2012, mainly the subsidiaries or joint ventures of Sinopec, including Baling Petrochemical, Shijiazhuang Refinery and Petrochemical, joint venture of Sinopec and Hengyi Petrochemical, etc.. In recent years, due to the policy support and the huge import substitution space of CPL market, a number of large scale enterprises in China have been involved in the field of CPL, including Haili Chemical, Fangming Chemical, Luxi Chemical, Lanhua Sci-Tech, China National Chemical, etc.. In particular, Haili Chemical and Fangming Chemical respectively released CPL capacity of 200 kilotons and 100 kilotons in 2012.

Global and China Caprolactam Industry Chain Report, 2012-2015 mainly involves the following contents:

Supply & demand, competition pattern, price, development forecast, etc. of CPL industry around the globe;

Supply & demand, competition pattern, import & export, price, development forecast, etc. of CPL industry in China;

Supply & demand, import & export, price, etc. of upstream industries as benzene, methylbenzene and phenol;

Supply & demand, import & export, price, etc. of downstream industries as PA6, polyamide fiber and nylon engineering plastics;

Operation, CPL business and development forecast of 8 CPL manufacturers around the globe and in China, and CPL projects under construction of 8 enterprises in China, etc.

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