

# Global and China Caprolactam Industry Chain Report, 2012-2015

<https://marketpublishers.com/r/GDD6000B8E1EN.html>

Date: April 2013

Pages: 83

Price: US\$ 1,950.00 (Single User License)

ID: GDD6000B8E1EN

## 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.

## Contents

### **1. OVERVIEW OF CPL INDUSTRY**

- 1.1 Definition and Function
- 1.2 Production Process
- 1.3 Industrial Chain

### **2. GLOBAL CPL INDUSTRY**

- 2.1 Development Progress
- 2.2 Supply
- 2.3 Demand
- 2.4 Competition Pattern
- 2.5 Price
- 2.6 Development and Forecast

### **3. CPL INDUSTRY IN CHINA**

- 3.1 Development Progress
- 3.2 Supply
- 3.3 Demand
- 3.4 Competition Pattern
- 3.5 Import and Export
- 3.6 Price
- 3.7 Development and Forecast
  - 3.7.1 Development Trend
  - 3.7.2 Supply and Demand Forecast

### **4. UPSTREAM INDUSTRIES OF CPL IN CHINA**

- 4.1 Pure Benzene
  - 4.1.1 Market Supply
  - 4.1.2 Market Demand
  - 4.1.3 Import and Export
  - 4.1.4 Price
- 4.2 Methylbenzene
  - 4.2.1 Supply and Demand
  - 4.2.2 Import and Export

#### 4.2.3 Price

### 4.3 Phenol

#### 4.3.1 Supply and Demand

#### 4.3.2 Import and Export

#### 4.3.3 Price

## **5. DOWNSTREAM INDUSTRIES OF CPL IN CHINA**

### 5.1 PA6

#### 5.1.1 Overview

#### 5.1.2 Supply

#### 5.1.3 Demand

#### 5.1.4 Import and Export

#### 5.1.5 Price

### 5.2 Polyamide Fiber

#### 5.2.1 Overview

#### 5.2.2 Operation

#### 5.2.3 Supply

#### 5.2.4 Price

### 5.3 Nylon 6 Engineering Plastics

## **6. MAJOR OVERSEAS ENTERPRISES**

### 6.1 BASF

#### 6.1.1 Profile

#### 6.1.2 Operation

#### 6.1.3 Operation of Plastics Division

#### 6.1.4 CPL Business

#### 6.1.5 Business in China

### 6.2 DSM

#### 6.2.1 Profile

#### 6.2.2 Operation

#### 6.2.3 Operation of Polymer Intermediate Division

#### 6.2.4 CPL Business

#### 6.2.5 Business in China

### 6.3 Chemax International Corporation

#### 6.3.1 Profile

#### 6.3.2 Operation

#### 6.3.3 Revenue Structure

#### 6.3.4 CPL Business

### **7. MAJOR ENTERPRISES IN CHINESE MAINLAND**

#### 7.1 Sinopec

##### 7.1.1 Profile

##### 7.1.2 Baling Petrochemical

##### 7.1.3 Shijiazhuang Refinery and Petrochemical

#### 7.2 Hengyi Petrochemical

##### 7.2.1 Profile

##### 7.2.2 Operation

##### 7.2.3 CPL Business

##### 7.2.4 Forecast and Prospect

#### 7.3 Juhua Co., Ltd.

##### 7.3.1 Profile

##### 7.3.2 Operation

##### 7.3.3 CPL Business

##### 7.3.4 Forecast and Prospect

#### 7.4 Haili Chemical

##### 7.4.1 Profile

##### 7.4.2 Operation

##### 7.4.3 Revenue Structure

##### 7.4.4 Gross Margin

##### 7.4.5 CPL Business

##### 7.4.6 CPL Projects under Construction

#### 7.5 Fangming Chemical

##### 7.5.1 Profile

##### 7.5.2 CPL Business

#### 7.6 Other CPL Projects under Planning/Construction

##### 7.6.1 Lanhua Sci-Tech

##### 7.6.2 Luxi Chemical

##### 7.6.3 China National Chemical Engineering

##### 7.6.4 Qinghua Group

##### 7.6.5 Xuyang Group

##### 7.6.6 Sanding Group

##### 7.6.7 Tongling Chemical Industry Group

##### 7.6.8 Sanning Chemical

## Selected Charts

### SELECTED CHARTS

Main Production Processes of CPL

Process Roadmap of Preparing CPL by Benzene

Industrial Chain of CPL

CPL Development Progress Worldwide

CPL Capacity and Growth rate Around the Globe, 2006-2012

Global CPL Capacity Distribution by Region, 2011-2012

CPL Output and Growth Rate Around the Globe, 2006-2012

Operation Rate of Global CPL Installations, 2006-2012

Downstream Consumption Structure of CPL Around the Globe, 2012

Global Major CPL Manufacturers and Their Capacities, 2012

Competition Pattern of CPL Around the Globe (by Capacity), 2012

Price Trend of CPL Worldwide, 2010-2013

CPL Capacity, Output and Operation Rate Worldwide, 2012-2016E

CPL Capacity and Growth Rate in China, 2006-2012

CPL Output and Operation Rate in China, 2006-2012

Apparent Consumption and Self-Sufficiency of CPL in China, 2006-2012

Downstream Consumption Structure of CPL in China, 2012

CPL Manufacturers in China and Their Capacities, 2011-2012

Competition Pattern of CPL in China (by Capacity), 2012

CPL Projects Under Planning/Construction in China, 2013-2018

Import and Export Volume of CPL in China, 2008-2012

Import and Export Average Price of CPL in China, 2008-2012

Import Source Structure of CPL in China (by Import Volume), 2012

Export Destination Structure of China's CPL (by Export Volume), 2012

Major Import Cities of CPL in China and Their Import Volume Proportion, 2012

Major Export Cities of CPL in China and Their Export Volume Proportion, 2012

CPL Ex-factory Prices of Baling Petrochemical and Nanjing DSM, 2006-2013

CPL Capacity, Output and Operation Rate in China, 2012-2016E

Apparent Consumption and Self-Sufficiency of CPL in China, 2012-2016E

Pure Benzene Output and Growth Rate in China, 2006-2012

Pure Benzene Output Structure (by Region) in China, 2012

Apparent Consumption and Self-Sufficiency of Pure Benzene in China, 2008-2012

Import Volume and Export Volume of Pure Benzene in China, 2008-2012

Import and Export Average Price of Pure Benzene in China, 2008-2012

Import Source Structure of Pure Benzene in China (by Import Volume), 2012

Export Destination Structure of China's Pure Benzene (by Export Volume), 2012  
Price Trend of Pure Benzene in China, 2003-2013  
Market Price of Pure Benzene in China (by Region), Apr.5th 2013  
Ex-factory Prices of Major Pure Benzene Manufacturers in China, 2012-2013  
Methylbenzene Output and Growth Rate in China, 2006-2012  
Apparent Consumption and Self-Sufficiency of Methylbenzene in China, 2006-2012  
Import Volume and Export Volume of Methylbenzene in China, 2008-2012  
Import Source Structure of Methylbenzene in China (by Import Volume), 2012  
Export Destination Structure of China's Methylbenzene (by Export Volume), 2012  
Price Trend of Methylbenzene in China, 2003-2013  
Market Price of Methylbenzene (by Region) in China, Apr.5th 2013  
Ex-factory Price of Major Methylbenzene Manufactures in China, 2012-2013  
Phenol Output and Growth Rate in China, 2008-2012  
Apparent Consumption and Self-Sufficiency of Phenol in China, 2008-2012  
Major Phenol Projects to Production in China, 2013  
Import Volume and Export Volume of Phenol in China, 2008-2012  
Import Source Structure of Phenol in China (by Import Volume), 2012  
Export Destination Structure of China's Phenol (by Export Volume), 2012  
Price Trend of Phenol in China, 2003-2013  
Market Price of Phenol in China (by Region), Apr.12th 2013  
Ex-factory Prices of Major Phenol Manufacturers in China, 2012-2013  
Capacity, Output and Operation Rate of PA6 Slice in China, 2008-2012  
Regional Distribution of PA6 Capacity in China, 2012  
Apparent Consumption and Self-Sufficiency of PA6 in China, 2008-2012  
Import Volume and Export Volume of PA6 Slice in China, 2008-2012  
Import Source Structure of PA6 Slice in China (by Import Volume), 2012  
Export Destination Structure of China's PA6 Slice (by Export Volume), 2012  
Major Import Cities of PA6 Slice in China and Their Import Volume proportion, 2012  
Major Export Cities of PA6 Slice in China and Their Export Volume proportion, 2012  
PA6 Market Price at Shanghai Zhongshan Chemical Market in China, 2003-2013  
Major Suppliers, Products and Prices of PA6 in East China, Mar.22nd 2013  
Operating Revenue and Growth Rate of Polyamide Fiber Industry in China, 2006-2012  
Total Profits and Growth Rate of Polyamide Fiber Industry in China, 2006-2012  
Polyamide Fiber Output and Growth Rate in China, 2006-2012  
Polyamide Fiber Output Structure in China (by Region), 2012  
Market Price of Nylon 6 Slice (Conventional Spun Filament) in China, 2008-2012  
Demand and Growth Rate of Nylon 6 Engineering Plastics in China, 2006-2012  
Sales and EBITDA of BASF's Plastics Division, 2010-2012  
Revenue Structure of BASF's Plastics Division (by Product), 2010-2012



Revenue Structure of Plastics Division's High Performance Polymer Business (by Region), 2010-2012

Revenue and Net Income of Chemax International Corporation, 2009-2012

Revenue of Chemax International Corporation (by Product), 2009-2011

Revenue Structure of Chemax International Corporation (by Product), 2009-2011

Revenue of Chemax International Corporation (by Region), 2009-2011

Revenue Structure of Chemax International Corporation (by Region), 2009-2011

CPL and Nylon Particle Capacity, Output and Operation Rate of Chemax International Corporation, 2009-2011

Sales Volume of Chemax International Corporation's CPL and Nylon Particle (by Region), 2009-2011

Output and Revenue of Baling Petrochemical, 2011-2012

Development Progress of Baling Petrochemical's CPL Business

Development Planning of Baling Petrochemical's CPL Business, 2013-2020

Revenue and Net Income of Hengyi Petrochemical, 2010-2012

Revenue and Net Income of Hengyi Petrochemical, 2011-2015E

Revenue and Net Income of Juhua, 2010-2012

Revenue and Net Income of Juhua, 2011-2015E

Operating Revenue and Net Income of Haili Chemical, 2009-2012

Operating Revenue of Haili Chemical (by Product), 2009-2012

Operating Revenue Structure of Haili Chemical (by Product), 2009-2012

Operating Revenue of Haili Chemical (by Region), 2009-2012

Operating Revenue Structure of Haili Chemical (by Region), 2009-2012

Gross Margin of Haili Chemical by Product, 2009-2012

CPL Capacity, Output, Sales Volume and Sales Price of Haili Chemical, 2012

Revenue of Haili Chemical's CPL Products, 2012



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