

# Global and China High Performance Fiber Industry Report, 2013-2016

<https://marketpublishers.com/r/GF7DF89C0E0EN.html>

Date: October 2013

Pages: 108

Price: US\$ 2,300.00 (Single User License)

ID: GF7DF89C0E0EN

## Abstracts

High-performance fibers boast important strategic materials. Notably, aramid fiber, carbon fiber and high-strength PE fiber are the most widely applied high-performance fibers with the most impressive comprehensive performance. At present, China is still in the fledging stage when it comes to the application of high-performance fibers which witness a severe short supply. Spurred by government policies, China high-performance fiber industry is expected to keep a growth rate of 10%-20% in the forthcoming decade.

### 1. Aramid Fiber

Aramid fiber falls into meta-aramid and para-aramid, of which the former finds application in high-temperature filter material, firefighter uniform and insulated wear fields, while the latter gets used in safety protection, bullet-proof and material reinforcement fields, etc.

The worldwide aramid fiber capacities concentrate in a minority of businesses in the US, Japan and China. In particular, meta-aramid market is in a large part dominated by the US-based Dupont with the capacity accounting for 62.5%, while in the para-aramid market, Dupont and Japan-based TeiJin take a lion's share in the world, with the proportion exceeding 80%.

Chinese aramid fiber industry develops later and demonstrates laggard production technology with products dominated by low- and medium-end series. In 2012, China's meta-aramid output met the domestic market and some of the products were exported to other countries. Major meta-aramid producers in China include Yantai Tayho Advanced Materials, SRO Group, and Guangdong Charming, of which, the meta-aramid

capacity of Yantai Tayho Advanced Materials reached 5,600 tons/a, taking up the first place in China and the second place in the world. However, due to the technological restriction, China's actual output of para-aramid is small, with the import dependence rate as high as around 70%.

## 2. Carbon Fiber

Carbon fiber characterizes outstanding mechanical property and chemical stability but weak toughness, being widely applied in industry, sports goods, aviation and aerospace, etc. In particular, the demand for carbon fiber in industrial fields shows the most rapid growth, with the application proportion rising to 62.1% in 2012.

The global carbon fiber market features high market concentration, with capacities chiefly held by Japanese and American businesses. For example, small-tow PAN-based carbon fiber producers include Toray Industries, Toho Tenax and Mitsubishi Rayon, while large-tow PAN-based carbon fiber producers include Zoltek, and pitch-based carbon fiber producer mainly refers to KUREHA.

Recent years have seen rapid development of China carbon fiber industry, with the capacity in 2012 soaring to 14,500 tons. But carbon fiber products made in China are largely low-end products, thus, it sees a short supply of high-end carbon fiber products. In addition, carbon fiber production equipments of a great many of businesses are unstable, leading to a relatively low output in reality with the import dependence rate of carbon fiber as high as around 70%.

## 3. High-Strength PE Fiber

High-strength PE fiber features remarkable mechanical and anti-corrosion properties but poor heat resistance, being widely applied in rope mesh, safety protection, sports and leisure fields, etc.

As a kind of scarce materials in the world, high-strength PE fibers reached the annual demand approximating 50,000 tons, as opposed to its output of 10,000 tons at most. Thus, it is a big gap. Worldwide, high-strength PE fiber market is dominated by Holland-based DSM, Japan-based TOYOBO and America-based Honeywell, with the collective capacity making up 70% of the world's total.

In 2012, the high-strength PE fiber capacity of China hit 12,200 tons, with major producers including Shandong TREVO, Surrey Hi-Tech and Ningbo Dacheng Advanced

Material. However, China lags far behind when it comes to both the equipments and technologies for the production of high-strength PE fibers, with the actual annual output no more than 2,000 tons.

The report highlights:

- development plans and demand forecast on China's three major high-performance fibers during the 12th Five-Year Plan period;

- supply & demand and competition pattern of world and China aramid fiber industry;

- supply & demand, competition pattern, import & export, and development forecast of world and China carbon fiber industry;

- supply & demand, and competition pattern of world and China high-strength PE fiber industry;

- Operation, high-performance fiber business, and development forecast of world and China's 15 high-performance fiber production businesses.

## Contents

### **1. OVERVIEW OF HIGH-PERFORMANCE FIBER INDUSTRY**

- 1.1 Overview
- 1.2 Classification
- 1.3 Performance
- 1.4 Industrial Features
- 1.5 Development Planning

### **2. ARAMID FIBER INDUSTRY**

- 2.1 Overview
- 2.2 Meta-Aramid
  - 2.2.1 Global Market
  - 2.2.2 Chinese Market
- 2.3 Para-Aramid
  - 2.3.1 Global Market
  - 2.3.2 Chinese Market

### **3. CARBON FIBER INDUSTRY**

- 3.1 Overview
- 3.2 Classification & Application
- 3.3 Global Market
  - 3.3.1 Competition Pattern
  - 3.3.2 Supply & Demand
- 3.4 Chinese Market
  - 3.4.1 Supply
  - 3.4.2 Demand
  - 3.4.3 Development Prediction
- 3.5 Import & Export
  - 3.5.1 Carbon Fiber
  - 3.5.2 Other Carbon Fiber Products

### **4. HIGH-STRENGTH PE FIBER INDUSTRY**

- 4.1 Overview
- 4.2 Application

- 4.3 Global Market
- 4.4 Chinese Market

## **5. MAJOR FOREIGN COMPANIES**

### **5.1 DuPont**

- 5.1.1 Profile
- 5.1.2 Operation
- 5.1.3 Business Performance of Safety & Protection
- 5.1.4 Aramid Fiber Business
- 5.1.5 Business in China

### **5.2 TeiJin**

- 5.2.1 Profile
- 5.2.2 Operation
- 5.2.3 Carbon Fiber Business
- 5.2.4 Aramid Fiber Business
- 5.2.5 Business in China

### **5.3 Toray Industries**

- 5.3.1 Profile
- 5.3.2 Operation
- 5.3.3 Business Performance of Carbon Fiber Division
- 5.3.4 Carbon Fiber Business
- 5.3.5 Business in China

### **5.4 Zoltek**

- 5.4.1 Profile
- 5.4.2 Operation
- 5.4.3 Carbon Fiber Business
- 5.4.4 Development of Carbon Fiber Business

### **5.5 KUREHA**

- 5.5.1 Profile
- 5.5.2 Operation
- 5.5.3 Business Performance of Advanced Material Division
- 5.5.4 Carbon Fiber Business

### **5.6 DSM**

- 5.6.1 Profile
- 5.6.2 Operation
- 5.6.3 Business Performance of High-Performance Material Division
- 5.6.4 High-Strength PE Fiber Business
- 5.6.5 Business in China

## **6. LEADING ENTERPRISES IN MAINLAND CHINA**

### **6.1 Yantai Tayho Advanced Materials**

- 6.1.1 Profile
- 6.1.2 Operation
- 6.1.3 Revenue Structure
- 6.1.4 Gross Margin
- 6.1.5 R&D
- 6.1.6 Aramid Fiber Business
- 6.1.7 Prediction & Outlook

### **6.2 SRO Group**

- 6.2.1 Profile
- 6.2.2 Aramid Fiber Business

### **6.3 Guangdong Charming**

- 6.3.1 Profile
- 6.3.2 Aramid Fiber Business

### **6.4 Sinosteel Jilin Carbon**

- 6.4.1 Profile
- 6.4.2 Operation
- 6.4.3 Revenue Structure
- 6.4.4 Gross Margin
- 6.4.5 Clients & Suppliers
- 6.4.6 Carbon Fiber Business
- 6.4.7 Prediction & Outlook

### **6.5 Jilin Qifeng Chemical Fiber**

- 6.5.1 Profile
- 6.5.2 Operation
- 6.5.3 Revenue Structure
- 6.5.4 Gross Margin
- 6.5.5 Output & Sales
- 6.5.6 Selling Price
- 6.5.7 Carbon Fiber Business
- 6.5.8 Prediction & Outlook

### **6.6 Zhongfu Shenying Carbon Fiber**

- 6.6.1 Profile
- 6.6.2 Carbon Fiber Products
- 6.6.3 Operation
- 6.6.4 Development of Carbon Fiber Business

## 6.7 Sinotex Investment & Development

### 6.7.1 Profile

### 6.7.2 Operation

### 6.7.3 Revenue Structure

### 6.7.4 Gross Margin

### 6.7.5 Clients

### 6.7.6 High-Strength PE Fiber Business

### 6.7.7 Prediction & Outlook

## 6.8 Sinopec Yizheng Chemical Fiber Co., Ltd

### 6.8.1 Profile

### 6.8.2 Operation

### 6.8.3 Revenue Structure

### 6.8.4 High-Strength PE Fiber Business

### 6.8.5 Aramid Fiber Business

### 6.8.6 Prediction & Outlook

## 6.9 Shanghai Surrey Hi-Tech Co., Ltd.

### 6.9.1 Profile

### 6.9.2 High-Strength PE Fiber Business

## Selected Charts

### SELECTED CHARTS

Classification of High-Performance Fiber

Performances of Fibers of All Varieties

Three Major Kinds of High-Performance Fibers

Demand for Three Major Kinds of High-Performance Fibers in China and Growth Rate, 2013-2020E

Development Planning of Three Major Kinds of High-Performance Fibers in China during the 12th Five-Year Plan Period

Performance & Application: Meta-Aramid vs Para-Aramid

Capacities of Meta-Aramid Producers Worldwide and Their Plants, 2012

Application Structure of Meta-Aramid Worldwide, 2012

Capacities of Meta-Aramid Producers in China, 2012

Meta-Aramid Producers Worldwide and Their Plants, 2012

Meta-Aramid Producers in China and Their Plants, 2012

Application Structure of Para -Aramid in China, 2012

Production Flow of PAN-Base Carbon Fiber

Classification of Carbon Fiber Products by the Number of Each Bundle of Carbon Filament

Categories and Main Application of Carbon Fiber and Carbon Fiber Composite

Capacity of Worldwide Carbon Fiber Producers by Carbon Fiber Tow Capacity, 2012

Worldwide Carbon Fiber Capacity and Growth Rate, 2008-2012

Worldwide Carbon Fiber Demand and Growth Rate, 2008-2012

Application (%) of Carbon Fiber Worldwide in Three Leading Field, 2012

China Carbon Fiber Capacity and Growth Rate, 2008-2012

Major Carbon Fiber Producers in China, and Their Capacities, 2012

Planned and Ongoing Carbon Fiber Projects in China, 2013

China's Demand for Carbon Fiber and YoY Growth, 2008-2012

Carbon Fiber Consumption Structure in China, 2012

Supply & Demand in China Carbon Fiber Industry, 2012/2015

Carbon Fiber Consumption Structure in China, 2012/2015/2020

China's Import & Export Volume of Carbon Fiber, 2009-2013

Average Import & Export Prices of Carbon Fiber in China, 2009-2013

Import Sources of Carbon Fiber in China by Import Volume, Jan.-Aug., 2013

Export Destinations of Carbon Fiber in China by Export Volume, Jan.-Aug., 2013

Import & Export Volume of Other Carbon Fiber Products in China, 2009-2013

Average Import & Export Prices of Other Carbon Fiber Products in China, 2009-2013



Import Sources of Other Carbon Fiber Products in China by Import Volume, Jan.-Aug., 2013

Export Destinations of Other Carbon Fiber Products in China by Export Volume, Jan.-Aug., 2013

Application Fields and Use of High-Strength PE Fiber

Worldwide High-Strength PE Fiber Producers and Their Capacities, 2012

Chinese High-Strength PE Fiber Producers and Their Capacities, 2012

Net Sales and EBITDA of DuPont, 2010-2012

Sales of DuPont by Business Division, 2012

Sales and Operating Profit from Safety & Protection Business Division of DuPont, 2010-2012

Sales % from Safety & Protection Business Division of DuPont by Product, 2012

Sales % from Safety & Protection Business Division of DuPont by Downstream Market, 2012

Sales % from Safety & Protection Business Division of DuPont by Region, 2012

Capacities of Aramid Fiber of DuPont, 2012

Net Sales and Operating Profit of TeiJin, FY2008-FY2012

Sales Structure of TeiJin by Business Division, FY2012

Carbon Fiber Subordinates under TeiJin

Carbon Fiber Application Fields of Toho Tenax

Aramid Fiber Capacities of TeiJin, 2012

Net Sales and Net Income of Toray Industries, FY2009-FY2013

Sales Structure of Toray Industries by Business Division, FY2013

Net Sales and Operating Profit from Carbon Fiber Business Division of Toray Industries, FY2009-FY2013

Sales from Carbon Fiber Business of Toray Industries by Application Field, FY2011-FY2013

Sales Structure from Carbon Fiber Business of Toray Industries by Application Field, FY2011-FY2013

Development of Carbon Fiber Capacity of Toray Industries, 2013-2015E

Net Sales and Operating Profit of Zoltek, FY2008-FY2012

Sales % of Zoltek by Product, FY2010-FY2013

Sales % of Zoltek by Region, FY2010-FY2012

Sales and Operating Profit from Carbon Fiber Business of Zoltek, FY2008-FY2012

Sales and Operating Profit from Pre-oxygen-carbon-fiber Wire and Special Carbon Fiber

Business of Zoltek, FY2008-FY2012

Net Sales and Net Income of KUREHA, FY2009-FY2013

Sales % of KUREHA by Business, FY2011-FY2013

Sales and Operating Profit from Advanced Material Business Division of KUREHA, FY2009-FY2013

Sales of Main Products of Kureha's Advanced Material Business Division, FY2011-FY2013

Sales of DSM Dyneema Business, 2010-2012

High-Strength PE Fiber Capacity of DSM and Locations, 2012

Revenue and Net Income of Yantai Tayho Advanced Materials, 2008-2013

Revenue of Yantai Tayho Advanced Materials by Product, 2011-2013

Revenue % of Yantai Tayho Advanced Materials by Product, 2011-2013

Revenue of Yantai Tayho Advanced Materials by Region, 2011-2013

Revenue % of Yantai Tayho Advanced Materials by Region, 2011-2013

Gross Margin of Main Products of Yantai Tayho Advanced Materials, 2009-2013

R&D Costs and % of Total Revenue of Yantai Tayho Advanced Materials, 2010-2012

Capacity Development of Yantai Tayho Advanced Materials' Main products

Output and Sales Volume of Main Products of Yantai Tayho Advanced Materials, 2011-2012

Revenue and Net Income of Yantai Tayho Advanced Materials, 2012-2016

Main Technical Parameters of Aramid Fiber of SRO Group's X-FIPER

Main Technical Parameters of Aramid Fiber III of Guangdong Charming

Revenue and Net Income of Sinosteel Jilin Carbon, 2008-2013

Revenue of Sinosteel Jilin Carbon by Product, 2011-2013

Revenue Structure of Sinosteel Jilin Carbon by Product, 2011-2013

Revenue of Sinosteel Jilin Carbon by Region, 2011-2013

Revenue Structure of Sinosteel Jilin Carbon by Region, 2011-2013

Gross Margin of Sinosteel Jilin Carbon's Hit Products, 2011-2013

Revenue Contribution of Sinosteel Jilin Carbon's Top Five Clients, 2011-2013

Name List and Revenue Contribution of Top Five Clients of Sinosteel Jilin Carbon, H1 2013

Name List and Procurement Contribution of Top Five Suppliers of Sinosteel Jilin Carbon, 2012

Revenue and Net Income of Jilin Shen Zhou Carbon Fiber, 2012-2013

Revenue and Net Income of Jiangcheng Carbon Fiber, 2012-2013

Revenue and Net Income of Sinosteel Jilin Carbon, 2012-2016

Revenue and Net Income of Jilin Qifeng Chemical Fiber, 2008-2013

Revenue of Jilin Qifeng Chemical Fiber by Product, 2010-2012

Revenue % of Jilin Qifeng Chemical Fiber by Product, 2010-2012

Gross Margin of Jilin Qifeng Chemical Fiber's Major Products, 2008-2012

Output, Sales Volume and Output-Sales Ratio of Jilin Qifeng Chemical Fiber, 2009-2012

Sales Volume of Major Products of Jilin Qifeng Chemical Fiber  
Average Selling Prices of Hit Products of Jilin Qifeng Chemical Fiber, Procurement  
Price of Acrylonitrile and Price Differences, 2009-2012  
Average Selling Prices of Hit Products of Jilin Qifeng Chemical Fiber, 2010-2012  
Revenue and Net Income of Jilin Qifeng Chemical Fiber, 2012-2016  
Major Products of Zhongfu Shenyang Carbon Fiber  
Application Fields of Zhongfu Shenyang Carbon Fiber's Major Products  
Major Operation Indicators of Zhongfu Shenyang Carbon Fiber, 2008-2009  
Revenue and Net Income of Sinotex Investment & Development, 2008-2013  
Revenue of Sinotex Investment & Development by Product, 2011-2013  
Revenue Structure of Sinotex Investment & Development by Product, 2011-2013  
Revenue of Sinotex Investment & Development by Region, 2011-2013  
Revenue Structure of Sinotex Investment & Development by Region, 2011-2013  
Gross Margin of Hit Products of Sinotex Investment & Development, 2011-2013  
Revenue Contribution % of Sinotex Investment & Development's Top Five Clients,  
2011-2013  
Name List and Revenue Contribution of Sinotex Investment & Development's Top Five  
Clients, H1 2013  
Revenue and Net Income of Sinotex Investment & Development, 2013-2016  
Revenue and Net Income of Yizheng Chemical Fibre Company, 2008-2013  
Revenue of Yizheng Chemical Fibre Company by Product, 2011-2013  
Revenue Structure of Yizheng Chemical Fibre Company by Product, 2011-2013  
Revenue of Yizheng Chemical Fibre Company by Region, 2011-2013  
Revenue Structure of Yizheng Chemical Fibre Company by Region, 2011-2013  
Revenue and Net Income of Yizheng Chemical Fibre Company, 2013-2016  
Development of High-Strength PE Fiber Business of Jiangsu Softray

## I would like to order

Product name: Global and China High Performance Fiber Industry Report, 2013-2016

Product link: <https://marketpublishers.com/r/GF7DF89C0E0EN.html>

Price: US\$ 2,300.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/GF7DF89C0E0EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:  
Last name:  
Email:  
Company:  
Address:  
City:  
Zip code:  
Country:  
Tel:  
Fax:  
Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970