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Global and China Refractories Industry Report, 2016-2020

https://marketpublishers.com/r/G0FE9458442EN.html
Date: February 2016
Pages: 150
Price: US$ 2,600.00 (Single User License)
ID: G0FE9458442EN

Abstracts

Impacted by factors such as global economic downturn, China's economic slowdown, weak growth in downstream sectors of refractories industry, as well as the rising prices of raw materials in recent years, the refractories industry of China has seen fiercer competition, which has resulted in a fall in companies' orders and sales volume. Even worse, some have made losses.

In the first three quarters of 2015, the refractory output in China was 18.0825 million tons, down 7.63% from the same period of last year, with an estimated full-year output of roughly 26 million tons. Over the same period, China's refractory exports totaled 1.2997 million tons, down 7.61% year-on-year, as opposed to some 1.75 million tons for the full year.

Among key downstream sectors of refractories industry including steel, cement, glass, and building materials, steel represented the largest portion, at around 65% of the global total. In 2015, the crude steel output worldwide amounted to 1.6228 billion tons, a year-on-year fall of 2.8%, of which 803.8 million tons came from China, down 2.3% from the previous year.

Affected by overcapacity in downstream sectors like steel, industrial restructuring and the decreased consumption of refractories for per ton of steel, the demand for refractories in China is anticipated to drop to 21.4 million tons (including export) by 2020, of which refractory for steel will hit about 10.5 million tons.

Presently, there have been several large corporate groups such as Vesuvius, RHI, Morgan Advanced Materials, Magnesita Refratários, and Shinagawa Refractories in the global refractories industry, and all of them have business layout in China.

So far in China, there have been over 2,000 manufacturers of refractory raw materials and products, with the market featuring fierce competition and low concentration, and the combined market share of the top 10 companies reaching about 15%. Through complementing each other and trans-regional allied reorganization of preponderant enterprises over recent years, a number of leading players consisting of Yingkou Qinghua Group, Beijing Lier High-temperature Materials, Luyang Energy-saving Materials, Puyang Refractories Group, and Zhejiang Zili Corporation Limited have sprung up.

Yingkou Qinghua Group?As the largest producer of refractories in China and the place where the Asia’s largest basic refractory production base is located, Yingkou Qinghua Group is primarily focused on basic refractories with annual capacity of 2 million tons. Its revenue reported RMB3 billion or so in 2015.

Beijing Lier High-temperature Materials?As a large general contractor of steel-used refractories in China, Beijing Lier High-temperature Materials have extended its industrial chain aggressively over the recent years. It acquired Liaoning Jinhong Mining Co., Ltd and Liaoning Haicheng Zhongxing Mining Group and organized them into a magnesite base in 2013, and carried internal integration of six companies in Liaoning-based Magnesite Material Base in 2014, and then planned an investment of RMB30 million to set up Beijing Lier E-commerce Co., Ltd in 2015 in a bid to erect an online transaction platform for refractory products.

Luyang Energy-saving Materials?As the largest producer of ceramic fiber in China, Luyang Energy-saving Materials completed the strategic cooperation agreement with Unifrax I LLC and transferred 29% equities to the latter, and obtained 100% equities of Unifrax (Suzhou) as well as the exclusive distributorship of Luyang Unifrax’s products in China in May 2015. Later in September 2015, LuYang Co., Ltd was renamed Luyang Energy-saving Materials Co., Ltd

Global and China Refractories Industry Report, 2016-2020 released by ResearchInChina mainly analyzes the following:

- Supply and demand of refractory materials worldwide, status quo of development in major countries, etc.;
- Policies, industrial environment, etc for refractory materials in China;

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Supply and demand of refractory materials, competition pattern, etc in China;

Development status and major companies of basic refractory material, unshaped refractory material, ceramic fiber, etc.;

Upstream and downstream markets of refractory materials;

Operation, refractory material business analysis, etc of 13 global and 19 Chinese refractory material companies

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SELECTED CHARTS

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