

Global and China Carbon Fiber Industry Report, 2014-2017

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Abstracts

Carbon fiber is the new-generation reinforced fiber, mainly used in the fields of aerospace, industry, sports and leisure. In 2014, the global industrial applications like natural gas, wind power and automobiles showed the largest demand for carbon fiber, 64% or so.

In 2014, the global carbon fiber capacity totaled approximately 130 kt, mainly contributed by Japan, Europe and the U.S.. The world's top five companies -- Toray, Teijin, Mitsubishi Rayon, Germany SGL and Formosa Plastics shared 60% of the global carbon fiber capacity together.

Due to excellent performance, the market demand for carbon fiber has been strong. The global carbon fiber demand amounted to 70kt or more in 2014. Specifically, the demand from automotive lightweight grows faster, which attracts many companies to get involved in this field. SGL and BMW cooperate to make use of carbon fiber materials in the body structure of BMW i3 and i8. Toyota will use Toray's carbon fiber for Mirai fuel cell vehicles.

In 2014, China carbon fiber industry took shape, the T300 carbon fiber made in China partially replaced the imported one, and T700 and T800 technologies made breakthroughs. However, the Chinese producers hold backward technologies and pay high production costs; coupled with the declining international carbon fiber price in recent three years, Chinese carbon fiber enterprises are confronted with operating difficulties with a low operating rate. In 2014, China's output of carbon fiber only reached about 3kt, and the self-sufficiency rate was less than 20%.

In 2014, there were more than 30 Chinese carbon fiber manufacturers, but only Jiangsu

Hengshen Fiber Material and Zhongfu Shenying Carbon Fiber achieved the respective output of above 1 kt, while the carbon fiber devices of some enterprises were in a shutdown state. At present, China's planned / ongoing carbon fiber capacity hits 30 kt or more, but Chinese carbon fiber companies will delay or cancel some projects under greater pressure incurred by foreign competitors.

Despite China's low output growth rate, the demand for carbon fiber grows quickly and may ascend at the expected growth rate of more than 20% during 2015-2017. The favorable national policies and huge market potentials have prompted a number of listed companies to step in the field of carbon fiber, such as Kingfa, Fangda Carbon, Beijing Urban Construction, Hebang, Kangdexin and so forth.

The report mainly covers the followings:

Supply and demand, competition pattern, price analysis and development trend of the global carbon fiber industry;

Supply and demand, competition pattern, import and export, price analysis and development trend of Chinese carbon fiber industry;

Operation and carbon fiber business of nine overseas carbon fiber manufacturers;

Operation, carbon fiber business and development trend of eight carbon fiber manufacturers as well as the developments of 28 carbon fiber producers in Mainland China.

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