

# Global and China Engineering Plastics Industry Report, 2011-2012

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## Abstracts

Engineering plastics are a group of high polymer materials that can be used as structural stuff, can endure the mechanical stress in a wider range of temperatures, and can be applied against relatively harsh physical and chemical environment. In 2011, the global demand for engineering plastics approximated 9.5 million tons. Fueled by the development of automobile and electronic & electrical sectors, the demand for engineering plastics is expected to maintain a growth rate of around 5%, and promisingly, it will rise to 11.46 million tons or so in 2015.

The production and consumption of engineering plastics are mainly concentrated in Asia, North America and Europe, of which the engineering plastics market in North America and Europe has been saturated, while the demand for engineering plastics in Asia, especially in China, presents robust growth. In 2011, the demand for engineering plastics in China reached around 2.698 million tons, up 8.8% year-on-year.

Engineering plastics mainly include five kinds of universal engineering plastics (polycarbonate, polyamide, polyoxymethylene, polyethylene terephthalate and polyphenylene oxide), and such special engineering plastics as polyphenylene sulfide, polyimide and liquid crystal polymer. In 2011, the top 3 engineering plastics in terms of demand in China were polycarbonate, polyamide and polyoxymethylene, making up 49.0%, 17.6% and 14.3% of the total demand respectively. And the demand for special engineering plastics was relatively limited, accounting for only 6.4% in 2011.

### 1. Polycarbonate

Polycarbonate is widely applied in hollow plates, automotive instrument panel, bumpers, outer shells of electric tools, and optical disks, etc. The demand for polycarbonate in

Chinese market has increased rapidly in recent years, and the apparent consumption soared to 1.322 million tons in 2011 from 863 kilotons in 2007, with a CAGR of 11.3%. But the production of polycarbonate in China develops slowly. The polycarbonate self-sufficiency rate stood at 25.1% in 2011, and the demand was mainly satisfied by imports. Bayer and Japan-based Teijin are the major polycarbonate manufacturers in China, with their total capacity accounting for over 80% of China's total in 2011.

## **2. Polyamide**

Polyamide engineering plastics find extensive application in automobile and transportation industries, with the typical products being such spare parts as pump impeller, bearing and automotive electrical instruments. In 2011, the demand for polyamide engineering plastics in China grew 11.2% YoY to around 476 kilotons in 2011. The polyamide engineering plastics manufacturers in China not only include foreign players like Lanxess, BASF and DSM, but also consist of China Pingmei Shenma Group which boasts capacity of 84kt/a.

## **3. Polyoxymethylene**

Polyoxymethylene is mainly used for high-precision gears, instrument fine parts with complicated geometry, water taps, and gas explosion pipeline valve, etc. In 2011, the demand for polyoxymethylene in China was roughly 385 kilotons, with self-sufficiency rate of around 60%. The capacity of polyoxymethylene in China has been expanded rapidly in recent years and registered 410 kilotons in 2011, of which the capacity of domestic enterprises took approximately 80% of the total capacity. The major polyoxymethylene producers are Yunnan Yuntianhua Co., Ltd., Shenhua Ningxia Coal Industry Group Co., Ltd. and China National BlueStar (Group) Co, Ltd., etc.

## **4. Special Engineering Plastics**

Although China is heavily reliant on imported special engineering plastics, it is speeding up the development of special engineering plastics products and industrialized technologies. For instance, Sichuan Deyang Science & Technology Co., Ltd. boasts the capacity of 30kt/a PPS, Shanghai Pret Composites Co., Ltd., 200 tons/a TLCP, and Shenzhen Hifuture Electric Co., Ltd., 50 tons/a PI.

**The report resolves around the followings:**

Status quo, demand and regional distribution of the global engineering plastics industry;

Policies, supply & demand, consumption structure and development trend of Chinese engineering plastics industry;

Capacity, demand, competitive landscape and price trend of PC, PA, PBT, POM and PPO sectors both at home and abroad;

Supply & demand and competition pattern of PPS, LCP, PI and PSF industries in China and beyond;

Operation and engineering plastics business development of Global and China's 12 engineering plastics manufacturers.

## Contents

### **1. OVERVIEW OF ENGINEERING PLASTICS**

- 1.1 Concept
- 1.2 Classification
- 1.3 Top 5 Engineering Plastics

### **2. ENGINEERING PLASTICS MARKET**

- 2.1 Global Market
- 2.2 Chinese Market
  - 2.2.1 Current Development
  - 2.2.2 Industry Policy
  - 2.2.3 Supply
  - 2.2.4 Demand
  - 2.2.5 Development Tendency

### **3. GENERAL ENGINEERING PLASTICS MARKET**

- 3.1 Polycarbonate (PC)
  - 3.1.1 Global Market
  - 3.1.2 Chinese Market
- 3.2 Polyamide (PA)
  - 3.2.1 Global PA Engineering Plastics Market
  - 3.2.2 Chinese PA Engineering Plastics Market
- 3.3 Polyoxymethylene (POM)
  - 3.3.1 Global Market
  - 3.3.2 Chinese Market
- 3.4 Polybutylene Terephthalate (PBT)
  - 3.4.1 Global Market
  - 3.4.2 Chinese Market
- 3.5 Polyphenylene Oxide (PPO)
  - 3.5.1 Global Market
  - 3.5.2 Chinese Market

### **4. SPECIAL ENGINEERING PLASTICS MARKET**

- 4.1 Polyphenylene Sulfide (PPS)

- 4.1.1 Global Market
- 4.1.2 Chinese Market
- 4.2 Liquid Crystal Polymer (LCP)
  - 4.2.1 Global Market
  - 4.2.2 Chinese Market
- 4.3 Polyimide (PI)
  - 4.3.1 Global Market
  - 4.3.2 Chinese Market
- 4.4 Polysulfone (PSF)

## **5. GLOBAL KEY ENTERPRISES**

- 5.1 Bayer
  - 5.1.1 Profile
  - 5.1.2 Operation of Bayer Material Science
  - 5.1.3 Revenue Structure of Bayer Material Science
  - 5.1.4 Engineering Plastics Business
  - 5.1.5 Development in China
- 5.2 Teijin
  - 5.2.1 Profile
  - 5.2.2 Operation
  - 5.2.3 Engineering Plastics Business
  - 5.2.4 Development in China
- 5.3 Lanxess
  - 5.3.1 Profile
  - 5.3.2 Operation
  - 5.3.3 Development in China
- 5.4 DSM
  - 5.4.1 Profile
  - 5.4.2 Operation of Functional Materials
  - 5.4.3 Revenue Structure of Functional Materials
  - 5.4.4 Engineering Plastics Business
  - 5.4.5 Development in China
- 5.5 DuPont
  - 5.5.1 Profile
  - 5.5.2 Operation of High Performance Materials
  - 5.5.2 Revenue Structure of High Performance Materials
  - 5.5.3 Engineering Plastics Business
  - 5.5.4 Development in China

## 5.6 BASF

- 5.6.1 Profile
- 5.6.2 Operation of Plastics Segment
- 5.6.3 Revenue Structure of Plastics Segment
- 5.6.4 Engineering Plastics Business
- 5.6.5 Development in China

## 6. MAJOR CHINESE ENTERPRISES

### 6.1 China Pingmei Shenma Group

- 6.1.1 Profile
- 6.1.2 Operation
- 6.1.3 Engineering Plastics Business

### 6.2 Yunnan Yuntianhua

- 6.2.1 Profile
- 6.2.2 Operation
- 6.1.3 Revenue Structure
- 6.1.4 Gross Margin
- 6.1.5 Engineering Plastics Business

### 6.3 Bluestar New Chemical Materials Co., Ltd.

- 6.3.1 Profile
- 6.3.2 Operation
- 6.3.3 Revenue Structure
- 6.3.4 Gross Margin
- 6.3.5 Clients
- 6.3.6 Engineering Plastics Business

### 6.4 Shanghai Pret

- 6.4.1 Profile
- 6.4.2 Operation
- 6.4.3 Revenue Structure
- 6.4.4 Gross Margin
- 6.4.5 R&D Expenditure
- 6.4.6 Engineering Plastics Business
- 6.4.7 Forecast and Outlook

### 6.5 Sinopec Yizheng Chemical Fibre

- 6.5.1 Profile
- 6.5.2 Operation
- 6.5.3 Revenue Structure
- 6.5.4 Gross Margin

6.5.5 Product Price

6.5.6 Output and Sales Volume

6.5.7 Engineering Plastics Business

6.6 Shenzhen Hifuture

6.6.1 Profile

6.6.2 Operation

6.6.3 Revenue Structure

6.6.4 Gross Margin

6.6.5 Engineering Plastics Business

## Selected Charts

### SELECTED CHARTS

Classification of Engineering Plastics

Global Demand for Engineering Plastics, 2008-2015E

Market Size of Global Engineering Plastics, 2008-2015E

Demand for Engineering Plastics and Growth Rate in China, 2007-2011

Consumption Structure of Engineering Plastics in China by Product, 2011

Global Polycarbonate Capacity (by Enterprise), 2011

Global Polycarbonate Capacity (by Region), 2009-2015E

Global Polycarbonate Demand and Growth Rate, 2007-2011

Polycarbonate Capacity in China, by June 2012

PC Projects under Planning/Construction in China, 2012

PC Output, Apparent Consumption and Self-sufficiency Rate in China, 2007-2011

PC Selling Price of HONAM in China, 2009-2011

Global Output of PA Engineering Plastics by Region, 2011

Key PA Engineering Plastics Manufacturers Worldwide, 2011

Major Foreign-funded PA Mixing Plants and Their Capacity in China, 2011

Demand for PA Engineering Plastics and Growth Rate in China, 2007-2011

Global POM Consumption Structure, 2011

Chinese POM Manufacturers and Their Capacity, 2011

POM Projects under Planning/Construction in China, 2012

POM Supply & Demand in China, 2006-2011

POM Consumption Structure in China, 2011

POM Price of Yunnan Yuntianhua, 2010-2011

Global Major PBT Manufacturers and Their Capacity, 2011

Consumption Structure of PBT Worldwide, 2011

Global PBT Consumption Structure, 2011

Global PBT Consumption by Region, 2011

Main PBT Manufacturers and Their Capacity in China, 2011

PBT Consumption Structure in China, 2011

Import Volume and Export Volume of PBT in China, 2007-2011

Import Origins of PBT in China by Import Volume, 2011

Export Destinations of PBT in China by Export Volume, 2011

Average PBT Price of Nantong Xingchen Synthetic Material Co., Ltd., 2010-2011

Performance of Major Special Engineering Plastics

Global PPS Capacity by Region, 2011

Key PPS Manufacturers and Their Capacity Structure Worldwide, 2011



PPS Manufacturers and Their Capacity in China, 2011  
Global Major TLCP Manufacturers and Their Capacity, 2011  
Global Demand for TLCP, 1991-2011  
Performance and Application of PI Engineering Plastics  
Major Resin Products of Bayer Material Science AG  
Sales Structure of Bayer by Division, 2010-2011  
Sales and EBITDA of Bayer Material Science, 2009-2011  
Sales Breakdown of Bayer Material Science by Product, 2009-2011  
Sales Structure of Bayer Material Science by Product, 2009-2011  
Sales Breakdown of Bayer Material Science by Region, 2009-2011  
Sales Structure of Bayer Material Science by Region, 2009-2011  
Bayer's PC Production Bases and Their Capacity, 2011  
Engineering Plastics Products of Teijin  
Sales Structure of Teijin by Business, FY2011  
Sales, Operating Income and Gross Margin of Film and Plastics Business of Teijin, FY2009-FY2011  
Teijin's PC Production Bases and Their Capacity, 2011  
Semicrystalline Resin Brands and Products of Lanxess  
Sales Structure of Lanxess by Division, 2010-2011  
Sales and EBITDA of Performance Polymers Segment of Lanxess, 2009-2011  
Sales Structure of DSM by Segment, 2010-2011  
Sales and EBITDA of DSM Functional Materials, 2009-2011  
Sales Breakdown of DSM Functional Materials by Product, 2009-2011  
Sales Structure of DSM Functional Materials by Product, 2009-2011  
Sales Structure of DuPont by Segment, 2011  
Sales and Operating Income of DuPont High Performance Materials, 2009-2011  
Sales Structure of DuPont High Performance Materials by Product, 2011  
Products of DuPont High Performance Materials by Application, 2011  
Sales Structure of DuPont High Performance Materials by Region, 2011  
Major Engineering Plastics Products of DuPont, 2011  
Major Plastics Enterprises and Products of DuPont in China, 2011  
BASF's Engineering Plastics Products  
Sales Structure of BASF by Division, 2011  
Sales and EBITDA of BASF Plastics, 2009-2011  
Sales Breakdown of BASF Plastics by Product, 2009-2011  
Sales Structure of BASF Plastics by Product, 2009-2011  
Sales Structure of Performance Polymers of BASF Plastics by Region, 2009-2011  
Major Production Bases and Their Capacity of BASF Plastics, 2011  
Revenue of China Pingmei Shenma Group, 2008-2011

Engineering Plastics Related Subsidiaries of China Pingmei Shenma Group and Their Main Products Capacity, 2011

Revenue and Net Income of Shenma Nylon Chemical, 2009-2011

Five Businesses and Capacity of Related Products of Yunnan Yuntianhua after Recombination

Revenue and Net Income of Yunnan Yuntianhua, 2007-2011

Revenue Breakdown of Yunnan Yuntianhua by Product, 2009-2011

Revenue Structure of Yunnan Yuntianhua by Product, 2009-2011

Revenue Breakdown of Yunnan Yuntianhua by Region, 2009-2011

Revenue Structure of Yunnan Yuntianhua by Region, 2009-2011

Gross Margin of Main Products of Yunnan Yuntianhua, 2009-2011

Revenue and Net Income of Bluestar New Chemical Materials Co., Ltd., 2007-2011

Revenue Structure of Bluestar New Chemical Materials Co., Ltd. by Product, 2009-2011

Revenue Structure of Bluestar New Chemical Materials Co., Ltd. by Region, 2009-2011

Gross Margin of Main Products of Bluestar New Chemical Materials Co., Ltd., 2009-2011

Bluestar's Revenue from Top 5 Clients and % of Total Revenue, 2009-2011

Name List and Revenue Contribution of Bluestar's Top 5 Clients, 2011

Revenue and Total Profit of Nantong Xingchen, 2007-2009

Revenue and Total Profit of Bluestar New Chemical Materials (Ruicheng), 2007-2009

Revenue and Net Income of Shanghai Pret, 2007-2011

Revenue Breakdown of Shanghai Pret by Product, 2009-2011

Revenue Structure of Shanghai Pret by Product, 2009-2011

Revenue Breakdown of Shanghai Pret by Region, 2009-2011

Revenue Structure of Shanghai Pret by Region, 2009-2011

Gross Margin of Main Products of Shanghai Pret, 2009-2011

R&D Costs and % of Total Revenue of Shanghai Pret, 2009-2011

Revenue and Net Income of Shanghai Pret, 2010-2014E

Revenue and Net Income of Sinopec Yizheng Chemical Fiber, 2007-2011

Revenue Breakdown of Sinopec Yizheng Chemical Fiber by Product, 2009-2011

Revenue Structure of Sinopec Yizheng Chemical Fiber by Product, 2009-2011

Revenue Breakdown of Sinopec Yizheng Chemical Fiber by Region, 2009-2011

Revenue Structure of Sinopec Yizheng Chemical Fiber by Region, 2009-2011

Main Products Gross Margin of Sinopec Yizheng Chemical Fiber, 2009-2011

Price Trend of Major Products of Sinopec Yizheng Chemical Fiber, 2009-H1 2011

Output of Major Products of Sinopec Yizheng Chemical Fiber, 2009-2011

Sales Volume of Major Products of Sinopec Yizheng Chemical Fiber, 2009-2011

Revenue and Net Income of Shenzhen Hifuture, 2007-2011

Revenue Breakdown of Shenzhen Hifuture by Product, 2009-2011

Revenue Structure of Shenzhen Hifuture by Product, 2009-2011  
Revenue Breakdown of Shenzhen Hifuture by Region, 2009-2011  
Revenue Structure of Shenzhen Hifuture by Region, 2009-2011  
Gross Margin of Major Businesses of Shenzhen Hifuture, 2009-2011  
PI Related Subsidiaries of Shenzhen Hifuture, 2011

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