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Global and China Engineering Plastics Industry Report, 2011-2012

https://marketpublishers.com/r/G89A7E9B94EEN.html
Date: June 2012
Pages: 96
Price: US$ 2,100.00 (Single User License)
ID: G89A7E9B94EEN

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:

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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.

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