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Global and China Organic Silicon Industry Report, 2010-2011

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Abstracts

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In 2010, China’s capacity of organic silicon monomer hit 1.63 million tons, up 49.5% year-on–year. With the ongoing pickup of market demand for downstream products of organic silicon such as high-temperature silastic, ambient temperature silastic and silicon oil, it is estimated that the output and apparent consumption of organic silicon monomer of China in 2011 will reach 1.15 million tons and 1.26 million tons, respectively, sustaining stable growth.

In 2010, the capacity of ambient and high-temperature organic silastic in China realized 450,000 tons and 280,000 tons, with respective year-on-year growth rate of 28.6% and 27.3%.

Capacity expansion was the major theme for the development of organic silicon businesses in China in 2010. Besides the organic silicon monomer producers which saw rapid growth in capacity, major domestic organic silicon enterprises including Bluestar New Chemical Materials, Wynca Chemical, Hongda New Materials and Dongjue Silicone went overdrive to invest in the downstream deep-processing product sectors such as silicon rubber and silicon oil. In particular, the deep-processing product capacity under construction of Bluestar New Chemical Materials and Wynca Chemical in 2010 realized 120,000 tons and 30,000 tons, respectively.

The fever of investment in downstream deep-processing products of organic silicon is largely attributable to the high profitability. A case in point is Guibao Technology, an

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organic silicon rubber producer, whose operating margin in 2010 was as high as 48.08%. By contrast, the figure of Bluestar New Chemical Materials, which is mainly engaged in the production of organic silicon monomer, was no more than 10.66%.

As the largest organic silicon producer of China, Bluestar New Chemical Materials' domestic capacity of organic silicon monomer hit 250,000 tons in 2010, and the figure is expected to soar to 470,000 tons by 2012. Meanwhile, Bluestar New Chemical Materials has made intensified efforts to construct deep-processing product projects involving in ambient and high-temperature silastic. As of late 2011, the capacity of deep-processing organic silicon products of Bluestar New Chemical Materials is estimated to expand to 180,000 tons from current 60,000 tons.

Wynca Chemical is an organic silicon manufacturer with the most sophisticated industry chain in China. As of 2010, the company's capacity of organic silicon monomer had realized 150,000 tons, and it was projected to expand to 250,000 tons by 2015. In addition, its capacity of organic silicon rubber reached 50,000 tons, with additional 87,000 tons under construction. Besides, Wynca Chemical also involves in the deep-processing projects such as white carbon and coupling agent.

Hongda New Materials boasts one of China's leading silicon rubber material manufacturers, with the capacity of organic silicon monomer in 2010 reaching 90,000 tons (expecting to hit 240,000 tons in the future). High-temperature silicon rubber is the hit product of Hongda New Materials. In 2010, the company's capacity of high-temperature silicon rubber registered 50,000 tons with additional 30,000 tons under construction. And the capacity is expected to soar to 110,000 tons later.

Dongjue Silicone, the biggest silicon rubber producer of China, specializes in the production of high-temperature silastic such as crude rubber and gross rubber. In 2010, the overall capacity of silicon rubber hit 120,000 tons/year, with the domestic market occupancy of 22%, ranking on top position for the 8th time in a row.

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