+44 20 8123 2220
info@marketpublishers.com

Global and China Refractory Material Industry Report, 2014-2016

https://marketpublishers.com/r/G711EA1F04CEN.html
Date: September 2014
Pages: 135
Price: US$ 2,400.00 (Single User License)
ID: G711EA1F04CEN

Abstracts

Refractory material is one of the indispensible materials in such high-temperature industries as iron and steel, building materials, chemicals, nonferrous metals, etc. Over 70% of refractory materials worldwide are applied in iron and steel smelting, 17% in building material industry and 4% in chemical industry.

Now, China is the largest producer and exporter of refractory materials around the globe. In 2013, China's refractory material output hit 28.189 million tons, sweeping more than 66% of the world's total; export volume topped 1.769 million tons, 51.7 times the import volume.

Despite the global leading position, Chinese refractory materials have been confronted with the prominent problem of overcapacity in recent years. Additionally, subject to growth slowdown in downstream sectors, the falling demand and other factors, market competition intensifies. Enterprises in the field received reduced orders and saw sales volume in decline, some companies even in the red.

According to statistics of The Association of China Refractories Industry (ACRI), in 2013, 59 key refractory material companies in China posted a year-on-year rise of 3.19% in refractory material output and a year-on-year increase of 2.83% in sales but a year-on-year drop of 10.36% in profit.

In the future, Chinese refractory material industry will enter a range of lower growth and may even experience some slight decrease. It is projected that during 2014-2016, Chinese refractory material output will register an AAGR of around 3.8%.

Against the sluggish market, companies at home and abroad have made breakthroughs

in various ways, in which merging and reorganization becomes an edge tool in improving market concentration.

RHI is the largest refractory material company with 33 plants in the world, 4 of which are located in China, capable of producing 1.7 million tons of refractory materials annually. In 2013, RHI gained 69.6% equity of Orient Refractories Ltd. via two successive acquisitions; in 2014, RHI planned to take over one raw material plant in Erzurum, Turkey of Cihan Group and the mining right.

Vesuvius was once acquired by Cookson Group in 1986 and got separated from it at the end of 2012 and listed in London Stock Exchange. 2013 witnessed Vesuvius achieve revenue of GBP1.41 billion, in which GBP460 million came from refractory materials.

Puyang Refractories Group Co., Ltd. has successively acquired and reorganized Kunming Iron and Steel Refractories, Shanghai Baoming Refractories Co. Ltd., Jiaozuo Bigger Refractories Co., Ltd. and so forth; in 2013, Puyang Refractories gained 100% equity of Zhengzhou Huawei Refractories Co., Ltd. and in 2014 it planned to obtain 100% stake of Maanshan Yushan Metallurgical New Materials Co., Ltd. and 100% stake of Zhengzhou Huite Refractory Material Co., Ltd. via merger and acquisition.

Shandong Luyang Share Co., Ltd. brought in the overseas strategic investor – Unifrax Asia-Pacific Holding Limited, and gained 100% stake of Unifrax (Suzhou) in Aug. 2014.

Beijing Lier High-temperature Materials Co., Ltd. finalized its mergers and acquisitions of Liaoning Jinhong Mining and Liaoning Zhongxing Mining in 2013 and planned to spend RMB61.39 million in acquiring 100% equity of Shanghai Xintaishan High-temperature Engineering Materials Co., Ltd. (held by Shanxi Xixiaoping Refractories Co., Ltd.) in 2014.

Global and China Refractory Material Industry Report, 2014-2016 mainly analyzes the followings:

Development of global refractory material industry;

Policy and industry environment of Chinese refractory material industry;

Markey supply & demand, competitive landscape, etc. of Chinese refractory material market;

+44 20 8123 2220
info@marketpublishers.com

Development and major companies of refractory product segments such as basic refractory materials, unshaped refractory materials, ceramic fiber, etc.

Upstream/downstream refractory material market analysis;

Operation and refractory material business analysis of 7 key refractory material companies in the world and 8 ones in China.

+44 20 8123 2220
info@marketpublishers.com

Contents

1 PROFILE OF REFRACTORY MATERIALS

1.1 Definition and Classification
  1.1.1 Definition
  1.1.2 Classification
1.2 Industry Chain

2 DEVELOPMENT OF REFRACTORY MATERIALS WORLDWIDE

2.1 Market Supply & Demand
  2.1.1 Production
  2.1.2 Demand
2.2 Major Countires/Regions
  2.2.1 Europe
  2.2.2 USA
  2.2.3 Japan
  2.3.4 India
  2.3.5 Australia
  2.3.6 Brazil
2.3 Key Enterprises

3 DEVELOPMENT ENVIRONMENT OF REFRACTORY MATERIALS IN CHINA

3.1 Major Policies
3.2 Trade Environment
  3.2.1 Anti-dumping
  3.2.2 Export Quota
3.3 Industry Environment

4 REFRACTORY MATERIAL MARKET IN CHINA

4.1 Market Supply & Demand
  4.1.1 Production
  4.1.2 Consumption
4.2 Import & Export
  4.2.1 Export
  4.2.2 Import

+44 20 8123 2220
info@marketpublishers.com

4.3 Competition
4.3.1 Regional Pattern
4.3.2 Company Pattern

5 REFRACTORY PRODUCT SEGMENTS

5.1 Basic Refractory Materials
5.1.1 Development
5.1.2 Chrome-free Basic Refractory Materials
5.1.3 Competitive Landscape
5.2 Unshaped Refractory Materials
5.2.1 Development
5.2.2 Company Competition.
5.3 Ceramic Fiber
5.3.1 Development
5.3.2 Key Enterprises
5.3.3 Development Prospects

6 UPSTREAM/DOWNSTREAM REFRACTORY MATERIALS IN CHINA

6.1 Refractory Raw Material Market
6.1.1 Magnesite
6.1.2 Bauxite
6.1.3 Graphite
6.2 Downstream Refractory Material Market
6.2.1 Overview
6.2.2 Refractory Materials for Steel Industry
6.2.3 Refractory Materials for Glass Industry
6.2.4 Refractory Materials for Cement Industry

7 KEY COMPANIES WORLDWIDE

7.1 RHI
7.1.1 Profile
7.1.2 Operation
7.1.3 Development in China
7.2 Vesuvius
7.2.1 Profile
7.2.2 Operation

+44 20 8123 2220
info@marketpublishers.com

7.2.3 Refractory Material Business
7.2.4 Development in China
7.3 Magnesita Refratários
7.3.1 Profile
7.3.2 Operation
7.3.3 Refractory Material Business
7.3.4 Development in China
7.4 Krosaki Harima
7.4.1 Profile
7.4.2 Operation
7.4.3 Development in China
7.5 Shinagawa Refractories
7.5.1 Profile
7.5.2 Operation
7.5.3 Development in China
7.6 Saint-Gobain
7.6.1 Profile
7.6.2 Operation
7.6.3 Development in China
7.7 Morgan Advanced Materials (Formerly Morgan Crucible)
7.7.1 Profile
7.7.2 Operation
7.7.3 Development in China

8 KEY ENTERPRISES IN CHINA

8.1 Puyang Refractories Group Co., Ltd.
8.1.1 Profile
8.1.2 Operation
8.1.3 Revenue Structure
8.1.4 Gross Margin
8.1.5 Development Strategy
8.2 Shandong Luyang Share Co., Ltd.
8.2.1 Profile
8.2.2 Operation
8.2.3 Revenue Structure
8.2.4 Gross Margin
8.2.5 Development Strategy
8.3 Ruitai Materials Technology Co., Ltd.

+44 20 8123 2220
info@marketpublishers.com

8.3.1 Profile
8.3.2 Operation
8.3.3 Revenue Structure
8.3.4 Gross Margin
8.3.5 Operation of Subsidiaries
8.3.6 Development Strategy
8.4 Beijing Lier High-temperature Materials Co., Ltd?
8.4.1 Profile
8.4.2 Operation
8.4.3 Revenue Structure
8.4.4 Gross Margin
8.4.5 Development Strategy
8.5 Zhejiang Jinlei Refractories Co., Ltd.
8.5.1 Profile
8.5.2 Operation
8.5.3 Revenue Structure
8.5.4 Gross Margin
8.5.5 Key Projects
8.5.6 Development Strategy
8.6 Zhejiang Zili Corporation Limited
8.6.1 Profile
8.6.2 Operation
8.6.3 Revenue Structure
8.6.4 Major Clients
8.6.5 Development Strategy
8.7 Yingkou Qinghua Group Co., Ltd.
8.7.1 Profile
8.7.2 Operation
8.7.3 Key Projects
8.8 Wugang Refractory Co., Ltd.
8.8.1 Profile
8.8.2 Operation
8.9 Yingkou Jinlong Refractories Group Co., Ltd
8.9.1 Profile
8.9.2 Operation
8.10 Shandong Refractories Group Co., Ltd.
8.10.1 Profile
8.10.2 Operation
8.9.3 Major Subsidiaries

+44 20 8123 2220
info@marketpublishers.com

8.11 Tongda Refractory Technologies, Co. Ltd.
8.11.1 Profile
8.11.2 Operation
8.11.3 Key Projects
8.12 Sinosteel Refractory Co., Ltd.
8.12.1 Profile
8.12.2 Operation
8.13 Jiangsu Sujia Group Co., Ltd.
8.13.1 Profile
8.13.2 Operation
8.14 Haicheng Houying Tade Group Co., Ltd
8.14.1 Profile
8.14.2 Operation
8.14.3 Key Projects
8.15 Shanxi Xixiaoping Refractories Co., Ltd.
8.15.1 Profile
8.15.2 Operation
8.16 Others
8.16.1 Zhengzhou Zhengdong Technology Co., Ltd.
8.16.2 Shandong Luqiao New Materials Co., Ltd.
8.16.3 Sinosteel Luoyang Institute of Refractories Research Co., Ltd.
8.16.4 Haicheng Magnesite Refractory General Factory

9 SUMMARY AND FORECAST

9.1 Market
9.2 Enterprise

+44 20 8123 2220
info@marketpublishers.com

Selected Charts

SELECTED CHARTS

Classification of Refractory Material
Industry Chain of Refractory Material
Output of Refractory Materials Worldwide, 2011-2016E
Output Structure of Refractory Materials Worldwide by Country/Region, 2013
Demand for Refractory Materials Worldwide, 2009-2016E
Production Structure of Refractory Materials in Europe by Product, 2013
Application Fields and % of Refractory Materials in Brazil
Policies on Refractory Material in China, 2009-2014
Total Export Quota of Main Refractory Raw Materials in China, 2012-2014
Major Economic Indicators of Refractory Material Industry in China, 2011-2014
Output and YoY Growth of Refractory Materials in China, 2003-2016E
Output of Refractory Materials by Product in China, 2009-2014
Output of Refractory Materials in Major Provinces/Cities of China, 2012-2013
Apparent Consumption of Refractory Materials in China, 2011-2014
Annual Consumption of Refractory Materials (by Downstream Industry) in China
Import and Export Volume of Refractory Materials in China, 2011-2014
Export Volume of China’s Refractory Materials by Product, 2009-2014
Export Volume and % of China’s Refractory Materials by Country, 2013
Export Volume Structure of China’s Basic Refractory Materials by Country, 2013
Export Volume Structure of China’s Alumina-Silica Refractories by Country, 2013
Import Volume of China’s Refractory Materials by Product, 2011-2014
Output Structure of Refractory Materials (by Province/City) in China, 2013
Sales of Major Refractory Material Companies in China, 2013
Major Basic Refractory Raw Materials and Refractory Products
Typical Applications of Basic Refractory Materials
Application of Chromium-free Basic Firebrick in Developed Countries
Technology Roadmaps and Key Manufacturers of Chromium-free Basic Firebrick Substitutes
Comparison between Shaped Refractory Materials and Unshaped Refractory Materials
Proportion of Unshaped Refractory Materials in Major Countries/Regions, 2013
Application Fields and % of Ceramic Fiber in China
Output of Ceramic Fiber in China, 2007-2016E
Subsidiaries of the World's Leading Ceramic Fiber Manufacturers in China
Key Enterprises of Ceramic Fiber in China and Their Capacity, 2014H1
Substitution Advantages of Ceramic Fiber

+44 20 8123 2220
info@marketpublishers.com

Distribution of Magnesite Reserves Worldwide, 2013
Distribution Chart of Magnesite Resources in China
Output of Magnesite in Major Countries, 2012-2013
Export Volume of Magnesia in China, 2009-2014
Distribution of Bauxite Reserves Worldwide, 2012
Output of Bauxite in Major Countries, 2011-2012
Export Volume of Refractory Aluminum Clay in China, 2009-2014
Distribution of Natural Graphite Reserves Worldwide, 2013
Output and Application of Natural Graphite Worldwide, 2012
Distribution of Major Graphite Deposits in China
Export Volume of Natural Flake Graphite in China, 2009-2014
Output of Major Downstream Refractory Material Industries, 2012-2014
Refractory Materials for Iron and Steel Industry
Output and YoY Growth of Crude Steel in Major Regions Worldwide, 2013
Output and YoY Growth of Crude Steel in China, 2003-2014
Major Enterprises and Clients of Refractory Materials for Iron and Steel Industry in China
Distribution Chart of Refractory Materials for Glass Melting Furnace
Utilization Rate of Various Refractory Materials in Glass Furnace
Consumption of Fused Cast Aluminum Oxide for Various Glass Furnaces
Key Companies of Fused Cast Refractory Material in China and Their Leading Products
Application of Refractory Materials in Cement Kiln
Output of Cement in China, 2005-2014
Major Bases and Clients Worldwide of RHI, 2013
Development Course of RHI
Revenue and Profit of RHI, 2008-2014
Revenue Breakdown of RHI (by Business), 2011-2014
Operating Revenue Structure of RHI, 2013
Refractory Material Companies of RHI in China
Sales of RHI in China, 2010-2013
Revenue and Profit of Vesuvius, 2009-2014
Revenue Breakdown of Vesuvius (by Business), 2009-2014
Refractory Materials Revenue of Vesuvius, 2011-2014
Revenue and YoY Growth of Vesuvius (by Region) in 2013
Refractory Material Companies of Vesuvius in China
Global Layout of Magnesita
Net Revenue and Net Income of Magnesita, 2010-2014
Revenue Structure of Magnesita (by Business), 2012-2014
Major Economic Indicators of Refractory Materials of Magnesita (by Quarter),

+44 20 8123 2220
info@marketpublishers.com

2012-2014
Revenue Structure of Refractory Materials of Magnesita (by Region), 2012-2014
Revenue Structure of Refractory Materials of Magnesita (by Application), 2012-2014
Refractory Material Companies of Magnesita in China
Net Revenue and Net Income of Magnesita in China, 2010-2012
Development Course of Krosaki
Net Sales and Net Income of Krosaki, FY2007-FY2013
Net Sales of Krosaki (by Business), FY2010-FY2013
Net Sales of Krosaki (by Region), FY2010-FY2013
Development History of Shinagawa
Main Products of Shinagawa
Net Sales and Profit before Tax of Shinagawa, FY2003-FY2013
Major Economic Indicators of Shinagawa, FY2012-FY2013
Sales Breakdown of Shinagawa (by Business), FY2012-FY2013
Overseas Sales of Shinagawa, FY2004-FY2013
Distribution of Shinagawa's Companies in China
Major Economic Indicators of Saint-Gobain, 2004-2013
Major Application Fields and Competitors of Refractory Materials of Saint-Gobain
Sales and Operating Income Structure of Saint-Gobain (by Business), 2013
Sales and Operating Income Structure of Saint-Gobain (by Region), 2013
Refractory Material Companies of Saint-Gobain in China
Turnover of Saint-Gobain in China, 2006-2013
Revenue and Profit of Morgan Advanced Materials, 2009-2014
Revenue Breakdown of Morgan Advanced Materials (by Region/Country), 2012-2013
Revenue Breakdown of Morgan Advanced Materials (by Application Industry), 2012-2013
Major Companies of Morgan Advanced Materials in China
Revenue and Net Income of PRCO, 2007-2014
Output and Sales Volume of PRCO, 2011-2013
Operating Revenue and YoY Growth of PRCO (by Product), 2012-2014
Operating Revenue of PRCO (by Region), 2008-2014
Operating Revenue and % of PRCO (by Target Customer), 2011-2013
Operating Revenue and % of PRCO (by Sales Model), 2011-2013
Gross Margin of Refractory Materials of PRCO, 2008-2014
Gross Margin of Major Products of PRCO, 2012-2014
M&A Events of PRCO, 2009-2014
Subsidiaries of PRCO, 2014H1
Revenue and Net Income of Luyang Share, 2007-2014
Output and Sales Volume of Luyang Share, 2011-2013

+44 20 8123 2220
info@marketpublishers.com

Operating Revenue of Luyang Share by Product, 2010-2014
Operating Revenue of Luyang Share by Region, 2010-2014
Consolidated Gross Margin of Luyang Share, 2007-2014
Gross Margin of Luyang Share (by Product), 2007-2014
Revenue and Net Income of Ruitai Technology, 2007-2014
Output and Sales Volume of Ruitai Technology, 2011-2013
Operating Revenue of Ruitai Technology (by Product), 2011-2014
Operating Revenue of Ruitai Technology (by Region), 2008-2014
Gross Margin of Refractory Materials of Ruitai Technology, 2008-2014
Gross Margin of Ruitai Technology (by Product), 2011-2014
Revenue and Net Income of Ruitai Technology's Major Subsidiaries, 2013
Revenue and Net Income of Beijing Lier, 2008-2014
Output and Sales Volume of Beijing Lier, 2011-2013
Operating Revenue of Beijing Lier (by Product), 2012-2014
Operating Revenue of Beijing Lier (by Region), 2010-2014
Gross Margin of Refractory Materials of Beijing Lier, 2008-2014
Gross Margin of Beijing Lier (by Product), 2012-2014
Revenue and Net Income of Zhejiang Jinlei Refractories, 2008-2014
Major Products and Application Fields of Zhejiang Jinlei Refractories
Operating Revenue of Zhejiang Jinlei Refractories (by Product), 2010-2014
Operating Revenue of Zhejiang Jinlei Refractories (by Region), 2012-2014
Gross Margin of Zhejiang Jinlei Refractories, 2008-2014
Gross Margin of Main Products of Zhejiang Jinlei Refractories, 2008-2014
Fundraising Projects of Zhejiang Jinlei Refractories, 2014
Capacity of Fundraising Projects of Zhejiang Jinlei Refractories, 2009-2015E
Major Economic Indicators of Zhejiang Zili, 2011-2013
Output and Sales Volume of Main Products of Zhejiang Zili, 2011-2013
Operating Revenue of Zhejiang Zili (by Product), 2011-2013
Operating Revenue Structure of Zhejiang Zili (by Sales Model), 2011-2013
Zhejiang Zili's Revenue from Top 5 Clients and % of Total Revenue, 2011-2013
Construction Scheme of Fundraising Projects of Zhejiang Zili, 2014
Major Products and Applications of Yingkou Qinghua Group
Output of Refractory Materials of Yingkou Qinghua Refractory Material, 2012-2014
Output of Refractory Materials of Wugang Refractory, 2012-2014
Capacity of Yingkou Jinlong Refractories Group (by Product), 2014
Refractory Material Subsidiaries of Yingkou Jinlong Refractories Group and Their Major Products and Capacity, 2014
Development History of Shandong Refractories Group
Capacity of Major Subsidiaries/Branches of Shandong Refractories Group

+44 20 8123 2220
info@marketpublishers.com

Revenue and Net Income of Tongda Refractory Technologies, 2011-2014
Output of Refractory Materials of Jiangsu Sujia Group, 2012-2014
Major Refractory Material Products of Haicheng Houying Trade Group
Sales and Taxes of Haicheng Houying Trade Group, 2009-2013
Output of Refractory Materials of Haicheng Houying Trade Group, 2012-2014
Major Economic Indicators of Shanxi Xixiaoping Refractories, 2013
Capacity of Haicheng Magnesite by Product
Revenue and YoY Growth of Haicheng Magnesite, 2007-2015E
Growth Rates for Output and Export Volume of Refractory Materials in China, 2010-2016E
Sales of Major Refractory Material Companies Worldwide, 2013
Top 10 Refractory Material Companies by Output in China, 2013

+44 20 8123 2220
info@marketpublishers.com

I would like to order

Product name: Global and China Refractory Material Industry Report, 2014-2016
Product link: https://marketpublishers.com/r/G711EA1F04CEN.html
Price: US$ 2,400.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:
info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page https://marketpublishers.com/r/G711EA1F04CEN.html

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

**All fields are required

Custumer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at https://marketpublishers.com/docs/terms.html

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970