

Global and China Rubber Auxiliary Industry Report, 2011-2012

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Abstracts

Due to the sluggish demand in the global market, the development of rubber auxiliary industry of China suffered a setback in 2011, with the output and sales increasing by 8.0% and 8.3% year on year respectively, a decrease of 9.8 percentage points and 23.1 percentage points compared with the previous year.

Rubber antioxidant and rubber accelerator are two hit products in China's rubber auxiliary industry, with the combined output in 2011 hitting 552,600 tons or 73.0% of the total output of rubber auxiliary in China. In particular, phenylenediamine 4020 series and quinoline series RD are superior varieties among all the rubber antioxidants, with the output approaching 80% of the total output of rubber antioxidants; while sulfonamide CZ, NS and thiazole M, DM are major rubber accelerator products, with the output exceeding 70% of the total. In addition, the output of insoluble sulfur, as the major vulcanizer of radial tire, approached 50,000 tons in 2011 driven by the new and expansion projects.

In recent years, the production technology of rubber auxiliaries has seen increasingly improvement in China. Thanks to the Cleaner Production Policy, China has developed a series of energy-saving and environmental-friendly technologies including accelerant NS oxygen oxidation process, NS wastewater treatment and water resource comprehensive utilization technology, 10,000-ton-level high temperature stable insoluble sulfur technology, 10,000-ton-level pre-dispersed rubber auxiliary production technology, etc.

Moreover, a host of large-scale enterprises with intensive management have emerged in China. In 2011, enterprises with the sales exceeding RMB500 million numbered 7, with the sales making up 31.9% of the total sales of the rubber auxiliary industry. In

particular, Jiangsu Sinorgchem Technology, the largest PPD rubber antioxidant business in China, ranked the No. 1 place, with the sales surpassing RMB2.5 billion in 2011.

Furthermore, many competitive enterprises have also emerged in the fields of rubber accelerator, processing aid and insoluble sulfur in China.

At present, Shandong Sunshine Chemical boasts the flagship enterprise in the rubber accelerator industry of China. Listed in Singapore in 2007, the company specializes in the production of rubber accelerator and has been expanding to the fields of antioxidant and insoluble sulfur in recent years.

Shandong Yanggu Huatai Chemical is regarded as the largest scorch retarder CTP manufacturer in China. In 2012, the company put 10,000-ton CTP into production, increasing the capacity of scorch retarder to 20,000 tons. Subsequently, 15,000-ton rubber auxiliary M, 10,000-ton NS and 10,000-ton CBS projects were put into production, which largely increased its capacity.

The for-rubber-use insoluble sulfur market of China has long been monopolized by the America-based Flexsys. In February 2012, the first 10,000-ton-level insoluble sulfur production line independently designed and produced by Jiangxi Hengxingyuan Chemical was formally put into production, ending the monopoly of foreign enterprises. Furthermore, Jiangxi Hengxingyuan Chemical is scheduled to increase the output of insoluble sulfur to 20,000 tons in 2012 and land on the SME board of Shenzhen Stock Exchange in 2013.

Contents

1. OVERVIEW OF RUBBER AUXILIARY INDUSTRY

1.1 Definition and Classification

1.2 Industrial Chain

1.2.1 Upstream

1.2.2 Downstream

2. DEVELOPMENT OF RUBBER AUXILIARY INDUSTRY WORLDWIDE

2.1 Development History

2.2 Market Status

2.3 Enterprise Status

3. DEVELOPMENT OF RUBBER AUXILIARY INDUSTRY IN CHINA

3.1 Development Environment

3.1.1 Policy Environment

3.1.2 Trade Environment

3.2 Development History

3.3 Development Status

3.3.1 Overview

3.3.2 Enterprise Status

3.3.3 Technology Status

4. MARKET OF RUBBER AUXILIARY IN CHINA

4.1 Production

4.1.1 Output

4.1.2 Production Structure

4.1.3 Construction of Equipment

4.2 Demand

4.2.1 Market Scale

4.2.2 Demand of Main Products

4.3 Import and Export

4.4 Price Trends

4.4.1 Raw Material Prices

4.4.2 Prices of Main Products

5. MARKET SEGMENTS OF RUBBER AUXILIARY IN CHINA

5.1 Rubber Antioxidant

5.1.1 Definition and Classification

5.1.2 Production and Sales

5.1.3 Main Product Market

5.2 Rubber Accelerator

5.2.1 Definition and Classification

5.2.2 Production and Sales

5.2.3 Main Product Market

5.3 Rubber Processing Aids

5.3.1 Definition and Classification

5.3.2 Development Status

5.3.3 Main Product Market

5.4 Insoluble Sulfur

5.4.1 Definition

5.4.2 Development Status

6. KEY ENTERPRISES WORLDWIDE

6.1 Flexsys

6.1.1 Profile

6.1.2 Operation

6.1.3 Development in China

6.2 Lanxess

6.2.1 Profile

6.2.2 Operation

6.2.3 Development in China

6.3 Chemtura

6.3.1 Profile

6.3.2 Operation

6.3.3 Development in China

6.4 Agrofert

6.4.1 Profile

6.4.2 Operation

6.4.3 Development in China

7. KEY ENTERPRISES IN CHINA

7.1 Shandong Yanggu Huatai Chemical Co., Ltd.

7.1.1 Profile

7.1.2 Operation

7.1.3 Revenue Structure

7.1.4 Key Projects

7.2 Jiangsu Sinorgchem Technology Co., Ltd.

7.2.1 Profile

7.2.2 Operation

7.2.3 Key Projects

7.2.4 R&D Capability

7.3 Shandong Sunshine Chemical Co., Ltd.

7.3.1 Profile

7.3.2 Operation

7.3.3 R&D Capability

7.4 Kemai Chemical Co., Ltd.

7.4.1 Profile

7.4.2 Operation

7.4.3 R&D Capability

7.5 SINOPEC Nanjing Chemical Industries Co., Ltd.

7.5.1 Profile

7.5.2 Operation

7.6 Tianjin YiHua Chemical Co., Ltd.

7.6.1 Profile

7.6.2 Operation

7.7 Northeast Auxiliary Chemical Industry Co., Ltd.

7.7.1 Profile

7.7.2 Operation

7.8 Puyang Willing Chemicals Co., Ltd.

7.8.1 Profile

7.8.2 Operation

7.8.3 Development Strategy

7.9 Wuhan Jinghe Chemical Co., Ltd.

7.9.1 Profile

7.9.2 Operation

7.10 Nanjing Shuguang Chemical Group Co., Ltd.

7.10.1 Profile

7.10.2 Operation

7.10.3 Key Projects

7.11 Jiangsu ATE Polymer Material Co., Ltd.

7.11.1 Profile

7.11.2 Operation

7.12 Jiangxi Hengxingyuan Chemical Co., Ltd.

7.12.1 Profile

7.12.2 Operation

7.12.3 Development Strategy

8. DEVELOPMENT TRENDS OF RUBBER AUXILIARY IN CHINA

8.1 Industry Trends

8.2 Product Trends

8.2.1 Rubber Antioxidant

8.2.2 Rubber Accelerator

8.3 Technology Trends

Selected Charts

SELECTED CHARTS

Classification of Rubber Auxiliary
Industrial Chain of Rubber Auxiliary
Application Structure of Rubber Auxiliary in China
Consumption of Rubber Auxiliary Worldwide, 2004-2013
Joint Ventures and Main Products of Foreign Rubber Auxiliary Enterprises in China, 2000-2012
Anti-dumping Duty on Rubber Auxiliary of Main Countries Imposed by India
Main Economic Indicators of Rubber Auxiliary Industry in China, 2010-2011
Capacity of Main Rubber Auxiliary Enterprises in China, 2012H1
TOP10 Enterprises of Rubber Auxiliaries in China by Sales, 2011
Key Enterprises of Rubber Auxiliaries by Product in China
Output and Growth YOY of Rubber Auxiliaries in China, 2001-2012
Product Structure of Rubber Auxiliaries in China, 2005-2011
Latest Expansion Projects of Key Rubber Auxiliaries Enterprises in China, 2012
Output of Tire in China, 2005-2012
Sales of Rubber Auxiliaries in China, 2008-2012
Demand of Main Rubber Auxiliaries in China, 2015
Domestic and International Market Size of Main Rubber Auxiliaries, 2010
Export and Import of Main Rubber Auxiliaries in China, 2010
Export and Import of Main Rubber Auxiliaries in China, 2011
Average Price of Aniline in China, 2011-2012
Average Price of Main Rubber Antioxidant Products in China, 2011-2012
Average Price of Main Rubber Accelerator Products in China, 2011-2012
Classification of Rubber Antioxidant
Output of Rubber Antioxidant in China, 2001-2011
Export and Import of Rubber Antioxidant in China, 2002-2012
Apparent Consumption of Rubber Antioxidant in China, 2002-2011
Output and YoY Growth of Main Antioxidants in China, 2010
Output of Antioxidant 4020 and Antioxidant 4010NA in China, 2002-2011
Output of Antioxidant RD in China, 2002-2011
Classification of Rubber Accelerator
Output of Rubber Accelerator in China, 2001-2011
Export and Import of Rubber Accelerator in China, 2002-2012
Apparent Consumption of Rubber Accelerator in China, 2002-2011
Output and YoY Growth of Rubber Accelerator in China by Product, 2010

Output of Rubber Accelerator M in China, 2001-2011
Output of Rubber Accelerator NS in China, 2001-2011
Output of Rubber Accelerator CBS in China, 2001-2011
Application and Component of Major Rubber Processing Aids
Key Enterprises and Products of Rubber Processing Aids Worldwide
Key Enterprises and Products of Rubber Processing Aids in China
Insoluble Sulfur V.S Ordinary Vulcanizing Agent
Output of Insoluble Sulfur in China, 2001-2011
Ongoing and Upcoming Projects of Insoluble Sulfur in China, 2012
Sales and Net Income of Lanxess, 2006-2012
Business of Lanxess
Sales of Lanxess by Business, 2009-2011
Sales Breakdown of Lanxess by Region, 2011
Sales of Chemtura, 2006-2011
Main Products and Brand of Chemtura
Sales and Growth YoY of Chemtura by Business, 2011
Revenue and Net Income of Yanggu Huatai, 2007-2012
Gross Margin and Growth YOY of Yanggu Huatai by Product, 2011
Capacity and Revenue of Yanggu Huatai by Product, 2011
Operating Revenue and Proportion of Yanggu Huatai by Region, 2009-2011
Progress of Fundraising and Investment Projects of Yanggu Huatai, 2012
Sales of Jiangsu Sinorgchem, 2008-2011
Product Structure of Sunshine Chemical
Capacity of Sunshine Chemical by Product, 2007-2012
Output of Sunshine Chemical by Product, 2007-2011
Sales of Sunshine Chemical, 2007-2012
Sales of Kemai Chemical, 2008-2011
Sales of Tianjin YiHua, 2007-2011
Capacity of Main Products of Northeast Auxiliary, 2011
Main Products of Willing Chemicals
Capacity of Willing Chemicals by Product, 2008-2011
Subsidiaries and Main Businesses of Nanjing Shuguang Chemical Group

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