

Research Report on China's Polyester Industry Chain, 2013-2017

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Abstracts

The polyester industry chain mainly includes PX, PTA and PET. According to production and processing sequence, its basic upstream raw materials are PX, PTA and MEG, and the core product is PET. Downstream products include polyester fiber, polyester films and polyester bottle flakes.

Although the upstream and downstream production capacity of China's polyester industry chain is expansion-prone, growth rates of production capacity vary, which causes an obvious difference in supply and demand patterns of each link. In 2012, the production capacity of PTA in China ushers in the peak operation period, with over 10 million tons of newly-added PTA production capacity while only more than 2 million tons of newly-added PX production capacity in the corresponding period. The short supply of PX becomes the bottleneck of China's polyester industry chain in recent years, which limits the operating rate of PTA and polyester.

In 2012, influenced by changes in economic development cycles domestically and internationally and the market supply & demand, international crude oil prices largely fluctuate. Prices of PX, the raw material of polyester, tremendously change. Moreover, it is almost impossible for the increase in PTA prices resulting from the excessive production capacity. PTA industry chooses to halt production due to incapable of shifting the pressure from cost side to downstream industries, so the production and operation of enterprises are unfavorably affected.

The self-sufficiency rate of China's PX is low. The large proportion of foreign import volume is an important way making up the short supply of domestic PX. It is expected that the import volume of PX will further increase in 2012; the total import volume of China's PTA was 5.3775 million tons in 2011, with a decrease of about 0.5% YOY. In

2012, as massive PTA production capacity is put into production, the foreign dependence will further reduce; under the influence of the sluggish export in downstream textile and garment industries, the import of China's polyester decreased in 2011, and the export obviously increased.

Since 2011, the price of China's imported crude oil is basically at the historical high, which intensifies cost pressure of polyester raw materials.

As for regional layout, the development momentum of China's polyester industry is market-oriented, which forms the polyester industry cluster represented by the Yangtze River Delta. The common characteristics of the region are the swift and violent development of textile and chemical fiber industries and the generally large downstream demand for polyester products. According to the polyester output in 2011, Zhejiang and Jiangsu were still the most important polyester producing areas in China, with the proportion of 39.3% and 32.66% separately. The polyester output in Shanghai accounted for 11.69%, which is the third-largest polyester producing area in China. Scales of polyester industry are relatively small in other regions.

Since 2011, China's PTA production capacity again steps into the expansion period. It is expected that the total production capacity at the end of 2013 will be twice that at the end of 2010. The PTA consumption growth is the direct factor stimulating the increase in PX demand.

However, the newly-added PX production capacity is less in 2012 and 2013, which cannot completely fulfill the demand of newly-added PTA production capacity. The unmatched growth in the both production capacity will bring the dominance to PX link. PX prices are likely to rise with the operation of new PTA production capacity, which further pushes production costs of PTA. Meanwhile, because the PTA supply increases in the market and rising PX prices may be hindered in the transmission towards PTA link, PTA prices may be low and production profits are possible to decline.

On the whole, with the development of China's economy, the demand for polyester products is on the continuous rise. In recent years, the development prospect of China's polyester industry is bright.

More following information can be acquired through this report:

Supply and Demand of China's Polyester Industry

Import and Export of China's Polyester Industry

Investments of China's Polyester Industry

Major Enterprises and Operation of China's Polyester Industry

Prediction on Development Trend of China's Polyester Chain Industry

Following people are recommended to buy this report:

Upstream and Downstream Manufacturers of Polyester Industry, such as
PX/PTA Manufacturers

Polyester Product Trade Enterprises

Investors and Research Institutions Focusing on Polyester Chain Industry

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