Global and Chinese Silica Industry Report, 2015-2018

Description: China's silica (white carbon black) industry after rapid expansion over the preceding years has seen overcapacity and intensified competition among enterprises, combined with depressed demand from downstream sectors such as tire and shoemaking. China's silica capacity and output growth has been slow since 2013, with an around 50% capacity utilization of the industry. In 2015, the capacity and output rose 2.80% and 1.46% year on year to about 2,243 kilotons and 1,184 kilotons, respectively.

Against a slight downturn of the whole industry, Chinese silica enterprises are actively seeking breakthroughs by multiple means. Some companies are speeding up the R&D of high-performance silica technologies and launching projects; some competent players are beginning to get consciously involved in capital market and seeking a listing on the "New Three Board" (an over-the-counter market for growth enterprises); and a few ones are embracing business transformation.

Under the general trend of green tire development, the highly dispersible silica market in China has huge potential for development. Currently, Jiangxi Blackcat Carbon Black Inc., Ltd that is primarily focused on carbon black plans an 80 kt/a highly dispersible silica project in Jining, Shandong province, and Yuan Xiang Chemical Co., Ltd. plans to build a 100 kt/a green tire-dedicated highly dispersible silica production line in the next two to three years.

Moreover, foreign companies are also bullish on green tire's huge demand for silica. Solvay started its 80 kt/a highly dispersible silica project in Gunsan, S. Korea in April 2015, followed by an 85 kt/a highly dispersible silica project located in Poland in July, thus expanding the company's capacity to 465 kilotons. And Evonik Industries AG's highly dispersible silica project in Americana, Brazil is under construction, too.

There have been two major enterprises seeking a listing on the "New Three Board" since 2015, namely Wuxi Quechen Silicon Chemical Co., Ltd. and Yuan Xiang Chemical Co., Ltd. The former as the largest silica producer in China boasts a 250 kt/a capacity and was listed on the "New Three Board" in October 2015. The latter mainly produces silica used in silicone rubber, but also engages in the research and development of high performance silica in the fields of delustering agent and green tire; with a 20 kt/a capacity, it formally applied for "New Three Board" listing in December 2015. In addition, Tong Hua Shuang Long Chemical Industry Co., Ltd. as the first listed company with silica as its core business purchased Jilin Jinbao Pharmaceutical Co., Ltd. in October 2014 and then pharmaceutical business replaced silica to become the main engine for the company's performance.

The report mainly highlights the followings:
- Global silica market structure, supply and demand conditions
- China's silica industry policies, production structure, capacity, output, import and export, competition pattern, etc.
- Analysis on silica product segments in China, i.e. capacity, output, production structure, corporate capacity and projects of precipitated silica and fumed silica
- China's silica consumption structure as well as six major applications
- Analysis on 6 global and 20 Chinese precipitated / fumed silica manufacturers

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