

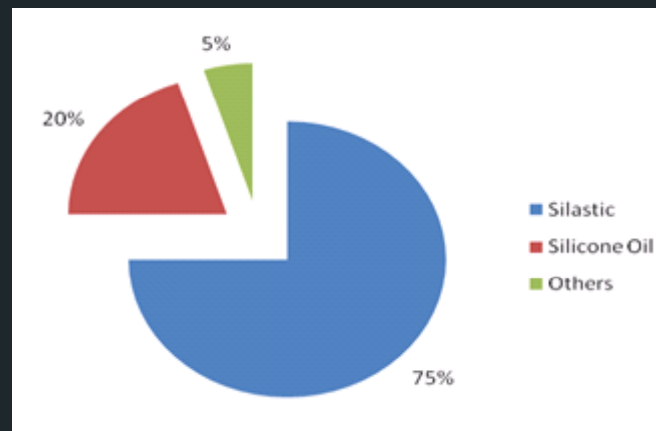
## China Organic Silicon Industry Report, 2009-2010



In 2009, capacity utilization of China's organic silicon industry was only 50% due to low market prices of organic silicon. The demand and supply in Chinese market of organic silicon monomer is still in balance, as the output capacity and apparent consumption respectively reaches 1.09 million tons and 1.10 million tons. As yet, foreign companies, Bluestar New Chemical Materials Co., Ltd and Zhejiang Wynca Chemical Group Co., Ltd have dominated China's medium and high-end organic silicon monomer market, and the other companies are all in low-end market competition. In the upcoming years, Chinese organic silicon monomer market will witness increasingly competition since the rapid spreading of organic silicon monomer technologies domestically.

Organic silicon monomer characterizes obvious benefit from production scale, yet there is a big gap of Chinese organic silicon producers to foreign counterparts. Currently, the total output capacity of organic silicon monomer of the global top four organic silicon giants accounts for 65.5% of the world's total, and just Dow Corning itself covers around 28%, reaching 860,000 tons a year. However, only a few companies like Wynca Chemical, Bluestar New Chemical Materials and Shandong Jinling can achieve mass-production of monomer, 100,000 tons and above, but still at lower level of scale production.

#### China's Organic Silicon Deep-processed Products Layout, 2009

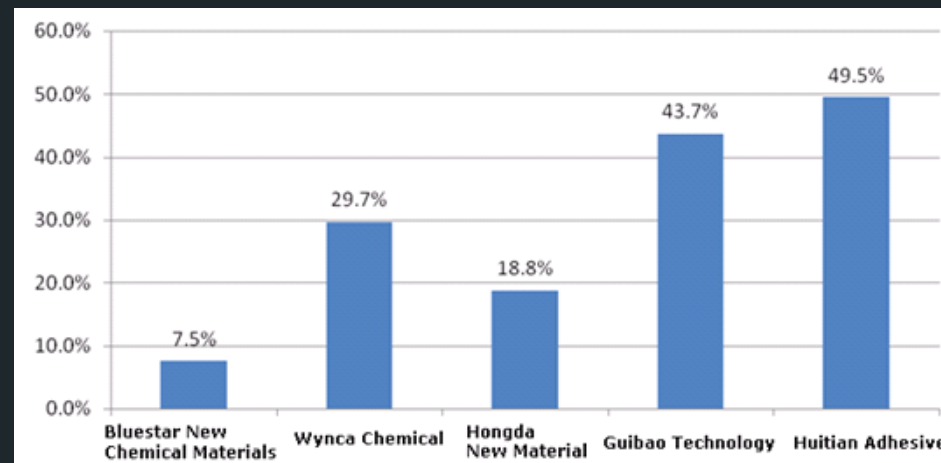


Source: ResearchInChina

When leading companies are conducting upstream and downstream integration, the production scale of organic silicon deep-processed products in China will maintain rapid growth. In 2009, the output of silastic and silicone oil took a 95% share of China's total output of organic silicon deep-processed products; wherein, the output capacity and output of room-temperature silastic approximated 350,000 tons and 260,000 tons, respectively, and the output capacity of high-temperature silastic was 220,000 tons.

At present, downstream product deep-processing has much better profitability than such upstream products as monomer and intermediates. For instance, in 2009, the profitability of downstream firms such as Guibao Technology and Huitian Adhesive was far higher than upstream ones like Bluestar New Chemical Materials with large monomer output capacity.

#### Gross Profit Margins of Organic Silicon Business of China's Organic Silicon Listed Companies, 2009



Source: Annual Reports of Companies, ResearchInChina

# Table of Contents

- **1 Overview of Organic Silicon Industry**
- 1.1 Performance of Organic Silicon
  - 1.1.1 Temperature Resistance
  - 1.1.2 Weather Resistance
  - 1.1.3 Electrical Insulation
  - 1.1.4 Physiological Inertia
  - 1.1.5 Low Surface Tension & Low Surface Energy
- 1.2 Development Stages
- 1.3 Industry Chain
  - 1.3.1 Organic Silicon Materials
  - 1.3.2 Organic Silicon Monomer
  - 1.3.3 Organic Silicon Intermediate
  - 1.3.4 Organic Silicon Products
  - 1.3.5 Applications
- **2 Development of Global Organic Silicon Industry**
- 2.1 Raw Material Market
- 2.2 Organic Silicon Monomer
- 2.3 Organic Silicon Intermediate
- 2.4 Organic Silicon Downstream Products
- **3 Development of China Organic Silicon Industry**
- 3.1 Raw Material Sector
  - 3.1.1 Metallic Silicon
  - 3.1.2 Glyphosate
  - 3.1.3 Chloromethanes (CMS)
  - 3.1.4 Methanol
- 3.2 Organic Silicon Monomer Sector
  - 3.2.1 Production
  - 3.2.2 Import
- 3.3 Organic Silicon Intermediate Sector
  - 3.3.1 Supply & Demand
  - 3.3.2 Price Trend
- 3.4 Downstream Products

- 3.4.1 Room-temperature Silastic
- 3.4.2 High-temperature Silastic
- 3.4.3 Silicone Oil
  
- **4 Competition in Organic Silicon Industry**
- 4.1 Competitiveness of Industry Chain
- 4.2 Market Concentration
- 4.3 Market Competition
  
- **5 Key Companies**
- 5.1 Dow Corning
  - 5.1.1 Profile
  - 5.1.2 Operation
  - 5.1.3 Business Expansion in China
- 5.2 Wacker
  - 5.2.1 Profile
  - 5.2.2 Operation
  - 5.2.3 Business Expansion in China
- 5.3 Momentive
  - 5.3.1 Profile
  - 5.3.2 Operation
  - 5.3.3 Business Expansion in China
  -
- 5.4 Shin-Etsu
  - 5.4.1 Profile
  - 5.4.2 Operation
  - 5.4.3 Business Expansion in China
- 5.5 Bluestar New Chemical Materials
  - 5.5.1 Profile
  - 5.5.2 Operation
  - 5.5.3 Performance
  - 5.5.4 Planning & Investment
- 5.6 Wynca Chemical
  - 5.6.1 Profile
  - 5.6.2 Operation
  - 5.6.3 Performance
  - 5.6.4 Planning & Investment
- 5.7 Hongda New Materials
  - 5.7.1 Profile
  - 5.7.2 Operation
  - 5.7.3 Performance
  - 5.7.4 Planning & Investment
- 5.8 Guibao Technology
  - 5.8.1 Profile
  - 5.8.2 Operation

- 5.8.3 Performance
- 5.8.4 Competitive Edge
- 5.8.5 Planning & Investment
- 5.9 Huitian Adhesive
  - 5.9.1 Profile
  - 5.9.2 Operation
  - 5.9.3 Performance
  - 5.9.4 Competitive Edge
  - 5.9.5 Planning & Investment
- 5.10 Others
  - 5.10.1 Calcium Carbide plant, Jilin Petrochemical Company
  - 5.10.2 Jiangsu Meilan Chemical Group
  - 5.10.3 Zhejiang Hesheng Chemical Group

## Selected Charts

- Four Development Stages of Global Organic Silicon Industry
- Organic Silicon Industry Chain Flow
- China's Organic Silicon Product Applications, 2009
- Dimethyl Selection Comparison of Organic Silicon Monomer Companies
- Monomer Scale Comparison of Global Main Organic Silicon Companies, 2009
- Siloxane Value-added Comparison of Global Main Organic Silicon Companies, 2009
- Global and China's Metallic Silicon Output, 2001-2009
- China's Metallic Silicon Export, 2001-2009
- Metallic Silicon Export Volume of China's Top 20 Companies, 2008-2009
- Metallic Silicon Price Trend, 2008-2010
- China's Glyphosate (95%) Price Trend, 2007-2010
- Output Capacity of China's Main Chlorometanes Companies, 2005-2010
- China's Methanol Supply & Demand, 2008-2009
- China's Organic Silicon Monomer Output, 2000-2009
- Monomer Scale Comparison of China's Main Organic Silicon Companies, 2008-2010
- China's Organic Silicon Monomer Import, 2000-2009
- List of Silicon Monomer (Intermediate) Anti-dumping Litigations Initiated by China, 2006-2009
- Polysiloxane Supply & Demand in China, 2000-2010
- Price Trend of Organic Silicon Intermediate, 2005-2010
- China's Organic Silicon Deep-processed Products Layout, 2009

- China's Organic Silicon Downstream Deep-processed Product Distribution by Application, 2009
- China's Room-temperature Silastic Applications and Company Distribution
- China's Organic Silicon Room-temperature Silastic Projects to be Constructed
- Organic Silicon Room-temperature Silastic Supply & Demand in Construction Field, 2008-2013
- Organic Silicon Room-temperature Silastic Supply & Demand in Industrial Field, 2008-2013
- China's High-temperature Silastic Supply & Demand, 2002-2008
- Competitiveness Comparison of Organic Silicon Industry Chain
- Number of Product Manufacturers in Organic Silicon Industry Chain
- Competition Layout of China's Organic Silicon Downstream Products
- Revenue and Net Profit of Dow Corning, 2003-2009
- Business Expansion of Dow Corning in China, 1973-2009
- Wacker Revenue and Profit Growth, 2007-2009
- Wacker Sales Ratio by Region, 2009
- Wacker Sales Ratio by Division, 2009
- Wacker Investment in China, 2004-2009
- Main Business Sales Ratios of Momentive, 2006-2009
- Momentive Organic Silicon Investment in China, 2001-2009
- Momentive Sales and Profit, FY2003-FY2010
- Main Business Revenue Structure of Bluestar New Chemical Materials, 2009
- Operating Profit Margin of Main Chemicals Business of Bluestar New Chemical Materials, 2009



- Project Investment of Bluestar New Chemical Materials, 2009
- Operating Revenue Ratio of Wynca Chemical's Main Products, 2009
- Profitability and Trend of Wynca Chemical's Main Products, 2007-2011
- Project Investment of Wynca Chemical, 2009
- Revenue of Hongda New Materials by Product, 2009
- Gross Profit Margin of Main Chemicals of Hongda New Materials, 2009
- Project Investment of Hongda New Materials, 2009
- Revenue Ratio of Guibao Technology's Main Products, 2009
- Gross Profit Margin of Guibao Technology's Main Products, 2009
- Project Investment of Guibao Technology, 2009
- Main Business Revenue Ratio by Product of Huitian Adhesive, 2009
- Gross Profit Margin Comparison of Huitian Adhesive's Main Products, 2009

## How to Buy

Product details			How to Order
	USD	File	By email: report@researchinchina.com
Single user	1,500	PDF	By fax: 86-10-82601570
Enterprisewide	2,250	PDF	By online: www.researchinchina.com
Publication date: May 2010			
For more information, call our office in Beijing, China:			
Tel: 86-10-82600828			
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