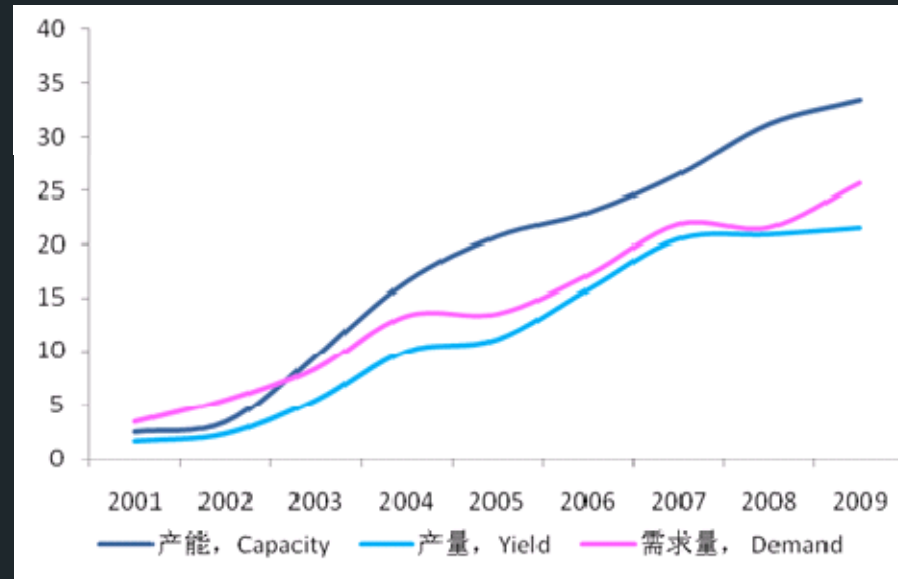


## China BDO-PTMEG-Spandex Industry Chain Report, 2009-2010



The supply and demand in China's spandex market in 2001-2009 has presented a spandex industry on the upgrade, with demand growing faster than supply. However, China's spandex investment slowed down in 2008-2009 due to the financial crisis. In 2009, China's spandex industry only added production capacity of 24,000 tons, up 7.1% year on year, while the demand increased by 19.1% year on year. The substantial market demand has brought new opportunities to China's spandex industry, and accordingly will promote the advancement of the spandex investment market in the coming two years. By the end of 2011, China will have increased its spandex production capacity by about 114,000 tons, up 33.9% over 2009.

### Supply and Demand in China's Spandex Industry, 2001-2009 (Unit: 10,000 tons)



Source: ResearchInChina

Meanwhile, the abundant supply from upstream BDO, PTMEG and pure MDI industries has also contributed to the development of spandex industry.

A case in point is PTMEG supply. Suppose that a ton of spandex requires 0.8 tons of PTMEG, China's demand for PTMEG was 269,000 tons in 2009, which, compared with the production capacity at the time, saw a gap down to 39,000 tons. With new PEMEG facilities put into operation, the demand-supply gap will further narrow down to 31,000 tons in 2010.

This report highlights the operating environment, development, demand & supply, competition pattern, import & export, price trend and prospect of the spandex industry of China. It also sheds light on the status quo, demand & supply, import & export and price tendency of upstream BDO, PTMEG and MDI industries and downstream textile industry, as well as the development and advantages of leading spandex enterprises of China.

For instance, Huafon Spandex takes a market share of 12.6% in terms of production capacity, ranking the first place in China. In 2009, although the average price of spandex, its main product, decreased by 19% over 2008, the sales volume increased by 46.1% year on year. Furthermore, the production cost per ton decreased by 21.2% year on year because of the declining prices of main raw materials, driving substantial growth of operating revenue, total profit and gross profit margin. The operating revenue rose by 17.7% to RMB1.1959 billion; total profit increased by 62.5% to RMB123.6 million; and the gross profit margin grew to 19%. In addition, with large-scale production capacity, high product differentiation, and strong brand competitiveness, Huafon Spandex will see huge market potential.

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