China Engineering Plastics Industry Report, 2010

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This report

- **Analyzes the status quo and development of the global and China's engineering plastics industry.**
- **Focuses on the market segments of engineering plastics, such as Polyphenylene Sulfide (PPS), Liquid Crystal Polymer, and Polyimide**
- **Highlights the operation and development of major enterprises in engineering plastics industry in worldwide and China.**

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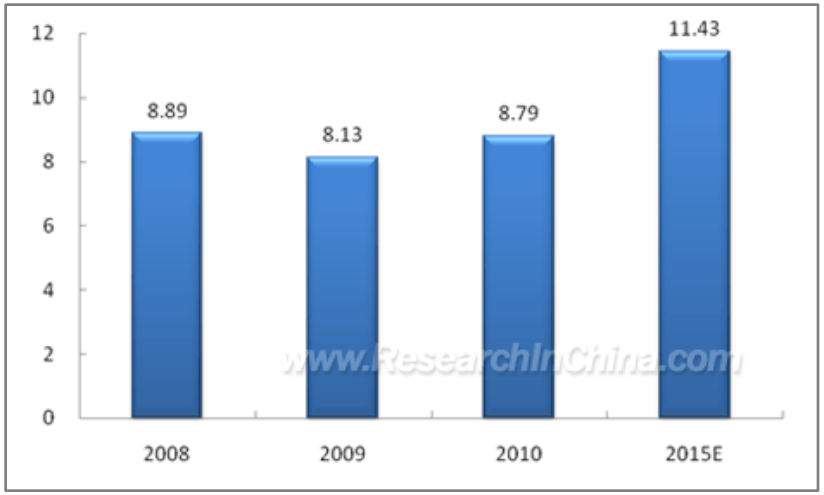
Abstract

Engineering plastics refer to those materials that can be used as structural stuff, can endure the mechanical stress in a wider range of temperatures, and can be applied against relatively harsh physical and chemical environment. In 2008, the world's demand for engineering plastics reached 8.89 million tons, but it fell to some extent in 2009 due to the global economic recession; fueled by the recovering demand of automobile and electronic & electrical products in 2010, the demand for engineering plastics registered 8.79 million tons, close to that in 2008, and promisingly, it will rise 30% from 2010 to 11.43 million tons in 2015.

The consumption of engineering plastics is centralized in developed countries and regions which characterize comparatively high market saturation and therefore saw the limited market growth margin in 2010. However, the demand for engineering plastics in emerging markets and regions is booming, with the growth margin of over 10% in 2010; hereinto, that in Chinese market approximated 2.50 million tons, up 11% year-on-year.

Global Demand for Engineering Plastics, 2008-2015E

(Unit: mln tons)



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Besides the analysis on both domestic and overseas markets of engineering plastics, the report also probes into the market segments and enterprise competitions of the Top 5 general engineering plastics (polycarbonate, polyamide engineering plastics, polyoxymethylene, polybutylece terephthalate, and polyphenylene oxide) and such special engineering plastics as polyphenylene sulfide and polyimide. Take polycarbonate, polyamide (PA) engineering plastics, and polyoxymethylene, the Top 3 by demand, as examples:

1. Polycarbonate

Polycarbonate is widely applied in hollow plates, safe lampshades, signal lamps, automotive instrument panels, bumpers, shells of electric tools, optical disk drives, etc. The polycarbonate consumption in Chinese market has increased rapidly in recent years, with the apparent consumption climbing to 1.20 million tons or so in 2010 from 620 kilotons in 2005, the CAGR of 14%, and the market size of about RMB30 billion. The production of polycarbonate in China develops slowly, the net import volume contributed more than 75% to the demand during 2005-2010, and the manufacturers are mainly foreign-fundedenterprises, wherein, the total capacity of TEIJIN and Bayer hold a proportion of 95%.

2. PA engineering plastics

PA engineering plastics are extensively employed in automobile and transportation industries, with the typical products such as pump impeller, fan blade, valve seat, bushing, bearing, instrument panels, automotive electrical instruments, and the like. In 2010, the demand for PA engineering plastics in China approached 410 kilotons, nearly the quintuple of 83.2 kilotons in

2000. Apart from such foreign-funded enterprises as LANXESS, BASF, and DSM, the Chinese PA engineering plastics manufacturers consist of Zhong Ping Energy Chemical Group whose annual capacity is 125 kilotons and ranks the first in Asia.

3. Polyoxymethylene

Polyoxymethylene is mainly for high-precision gears, instrument fine parts with complicated geometry, water taps, gas explosion pipeline valve, etc. The demand for polyoxymethylene in China was roughly 330 kilotons (net import volume: 166 kilotons) in 2010, up 15.8%YoY, and the production of Polyoxymethylene in China keeps rapid growth during the recent years. The capacity of domestic enterprises took 72% of the 250 kilotons in 2010, of which, China's YUNTIANHUA Group enjoyed 90 kilotons, and China National BlueStar (Group) Co., Ltd. and Henan Coal Chemical Industry Group (HNCC) held respectively 40 kilotons.

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