



**China Silicon Carbide Industry Report,
2010-2011**

May 2011

This report

- ◆ **Analyzes the operation environment, current development, supply & demand, competition pattern, import & export, price trend, and development trend of China silicon carbide industry**
- ◆ **Focuses on the supply & demand and price trend of silicon carbide upstream markets such as anthracite, petroleum coke, etc., and current development of silicon carbide downstream sector.**
- ◆ **Highlights the operation and development outlook of key Chinese enterprises.**

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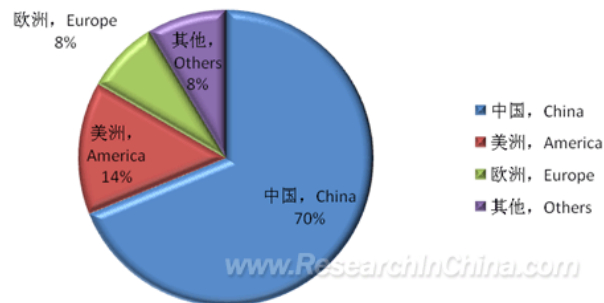
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Abstract

China is the large producer and exporter of silicon carbide. Fueled by the demand from such downstream sectors as PV, LED, and ceramics, China's silicon carbide output substantially increased in 2010 to 1.05 million tons or so, up 96.3% YoY, approximating 70% of the global total. In 2011, the first export quota of silicon carbide released by the Ministry of Commerce People's Republic of China turned out to be 129.6 kilotons, equivalent to that in 2010. In Q1 2011, the real export volume of silicon carbide in China reached 53.6 kilotons, occupying 41.6% of the first export quota in 2011.

Silicon Carbide Output by Region Worldwide, 2010



Source: ResearchInChina

The output and sales of silicon carbides in 2010 varied with different applications. Pulled by the rapidly developed industries like PV, fine ceramics, and high-grade polishing, the output and sales of green silicon carbide was evidently superior to that of black silicon carbide. In H1 2010, the revenue of green silicon carbide in China presented an 88.8% YoY rise, while that of black silicon carbide grew 44.7% YoY.

Meanwhile, Henan Xindaxin Materials and Yicheng New Material that give priority to green silicon carbide for PV-based powder boasted obviously larger output and sales than other silicon carbide manufacturers. Henan Xindaxin Materials, the vital supplier of functional materials in solar PV industry, enjoyed approximately 26% shares in wafer cutting material market. It acquired the operating income of RMB1.21 billion in 2010, up 121.0% from a year earlier. The capacity of Henan Xindaxin Materials has been on the rise in recent years, and the cutting material capacity will hit 100 kilotons or so at the end of 2011.

As the largest manufacturer of PV-based silicon powder in China, Yicheng New Material obtained the revenue of RMB4.1 billion in 2010, up 46% YoY. In May 2011, the Phase I project of 100-kiloton crystalline silicon linear cutting fine powder was accomplished; after the completion of the project, the annual output of crystalline silicon linear cutting fine powder can be 200 kilotons.

Lanzhou Heqiao Resource attaches importance to the sales of primary processing products, and it has made poor and declining performance in operating income during the recent three years, in spite of the No.1 capacity of silicon carbide in China in 2010. In consequence, Lanzhou Heqiao Resource will emphasize the development of silicon carbide deep-processing products in the following several years.

Apart from the focus on the operation environment, current development, supply & demand, competition pattern, import & export, price trend, and development trend of China silicon carbide industry, this report also highlights the analysis on the supply & demand and price trend of silicon carbide upstream markets such as anthracite, petroleum coke, etc., current development of silicon carbide downstream sector, as well as the operation and development outlook of key Chinese enterprises.

1. Overview of Silicon Carbide Industry

- 1.1 Definition and Classification
- 1.2 Properties and Applications
- 1.3 Market Characteristics

2. Operation Environment of Silicon Carbide Industry

- 2.1 International Environment
- 2.2 Domestic Environment
 - 2.2.1 Macro-Environment
 - 2.2.2 Policy and Market Environment

3. Development of Silicon Carbide Industry

- 3.1 Status Quo
- 3.2 Supply & Demand
 - 3.2.1 Total Supply & Demand
 - 3.2.2 Supply
 - 3.2.3 Demand
- 3.3 Competition Pattern
- 3.4 Export & Import
 - 3.4.1 Export Quota
 - 3.4.2 Export & Import
- 3.5 Price Trend
- 3.6 Development Outlook

4. Development of Silicon Carbide Upstream & Downstream Sectors

- 4.1 Upstream Sectors
 - 4.1.1 Silica Sand
 - 4.1.2 Anthracite
 - 4.1.3 Petroleum Coke
- 4.2 Downstream Sectors
 - 4.2.1 Abrasive Materials
 - 4.2.2 Refractory Materials
 - 4.2.3 Iron & Steel
 - 4.2.4 Ceramics
 - 4.2.5 Electronics

5. Key Companies

- 5.1 Henan Xindaxin Materials
 - 5.1.1 Profile
 - 5.1.2 Operation
 - 5.1.3 Development Outlook & Advantage
- 5.2 Yicheng New Material
 - 5.2.1 Profile
 - 5.2.2 Operation
 - 5.2.3 Development Outlook & Advantage
- 5.3 Danjiangkou Hongyuan Silicon Carbide
 - 5.3.1 Profile
 - 5.3.2 Operation
 - 5.3.3 Development Advantage

- 5.4 Ningxia Jinjing Metallurgicals and Minerals Industrial
 - 5.4.1 Profile
 - 5.4.2 Operation
- 5.5 Baishan City Power Carborundum
 - 5.5.1 Profile
 - 5.5.2 Operation
- 5.6 Yili Yineng Quality Silicone Carbon
 - 5.6.1 Profile
 - 5.6.2 Operation
- 5.7 Lanzhou Heqiao Resource
 - 5.7.1 Profile
 - 5.7.2 Operation
 - 5.7.3 Development Outlook
- 5.8 Qinghai Guiqiang Abrasive
- 5.9 Tonghua Hongxin Abrasive
 - 5.9.1 Profile
 - 5.9.2 Operation
- 5.10 Linshu Zhengyu Silicon Carbide Factory
 - 5.10.1 Profile
 - 5.10.2 Operation
 - 5.10.3 Development Advantage
- 5.11 Tankeblue Semiconductor
 - 5.11.1 Profile
 - 5.11.2 Operation & Outlook

- 
- Silicon Carbide Output by Region Worldwide, 2010
 - Silicon Carbide Manufacturers Worldwide and Their Capacities, 2010
 - Proportions of Downstream Demand for Silicon Carbide Worldwide, 2007-2011E
 - Chinese GDP and Growth Rate, 2006-2010
 - Power Consumption of Black Silicon Carbide and Green Silicon Carbide
 - Silicon Carbide Output and Demand of China, 2007-2010H1
 - Silicon Carbide Capacity in China by Region, 2010
 - Market Shares of Chinese Silicon Carbide Manufacturers (by Capacity), 2010
 - Price of Silicon Carbide in China by Region, May 2011
 - First-Time Quotas for Silicon Carbide Export, 2007-2011
 - Top 10 Bidding Winners of First-time Export Quota for Silicon Carbide, 2011
 - Import & Export Volume of Silicon Carbide in China, 2007-2011Q1
 - Import & Export Value of Silicon Carbide in China, 2007-2011Q1
 - Average Import & Export Price of Silicon Carbide in China, 2007-2011Q1
 - Major Export Destinations of Silicon Carbide in China, 2010
 - Major Export Destinations of Silicon Carbide in China, Jan.-Mar.2011
 - China Silicon Carbide Import Origins and Shares, 2010
 - Market Price of Silicon Carbide in China, Oct. 2010-May 2011
 - Monthly Average Export Price of Chinese Silicon Carbide, 2009-Mar. 2011
 - Distribution of Silica Sand Reserves in China
 - Anthracite Output in China by Region, 2008-2010
 - Anthracite Output in China, 2008-2011Q1
 - Market Price of Anthracite in China, May 2010-Apr. 2011

- Petroleum Coke Output in China, 2009-Apr. 2011
- Petroleum Coke Supply in China by Region, 2010
- Structure of Downstream Demand for Petroleum Coke, 2010
- Price Trend of Petroleum Coke in China and International Crude Oil, 2010-Mar. 2011
- Solar Cell Output in China, 2005-2010
- Export Value of Solar PV Products in China, 2005-2010
- Output and Growth of Refractory Material in China, 2003-Feb. 2011
- Output of Refractory Products in China and Proportion of Magnesite Brick, 2006-2010
- Crude Steel and Steel Output of China, 2007-Apr.2011
- Ceramic Tile Output of China, 2007-2010
- China LED Industry Layout by Region, 2010
- Total Industrial Sales of LED Industry in China, 2008-2011
- Operating Income and Net Income of Henan Xindaxin Materials, 2007-2010
- Gross Margin and Integrated Gross Margin of Henan Xindaxin Materials by Sector, 2008-2009
- Contribution of Henan Xindaxin Materials' Wafer Cutting Materials to Its Operating Income, 2007-2010
- Revenue of Yicheng New Material, 2008-2010
- Financial Indices of Danjiangkou Hongyuan Silicon Carbide, 2008-2009
- Operating Income and Profit of Ningxia Jinjing Metallurgicals and Minerals Industrial, 2007-2009
- Financial Indices of Baishan City Power Carborundum, 2007-2009
- Financial Data of Yili Yineng Quality Silicone Carbon, 2008-2009
- Operating Income and Profit of Lanzhou Heqiao Resource, 2007-2009
- Operating Income and Profit of Tonghua Hongxin Abrasive, 2007-2009

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