



**China BDO-PTMEG-Spandex Industry Chain
Report, 2010-2011**

June 2011

This report

- ◆ **Analyzes the operating environment of China spandex industry.**
- ◆ **Focuses on the upstream and downstream industries of spandex in China**
- ◆ **Highlights the operation leading spandex manufacturers in China**

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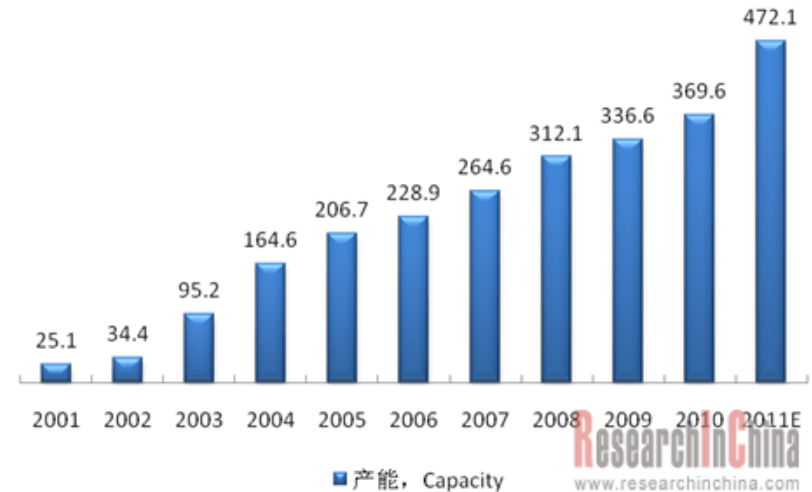
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Abstract

Driven by the recovery of textile industry, spandex industry of China saw boom in both production and sales in 2010, with the apparent consumption hitting 259,000 tons, up 18.1% year-on-year. Meanwhile, the output of spandex increased by 22.8% year-on-year to 274,000 tons, with the industrial operating rate soaring to 74.2%. And the spandex capacity rose by 9.8% year-on-year to 369,600 tons, an increase of 33,000 tons. It can be seen that the growth in demand and output was far ahead of the growth in capacity. However, some 27,000 tons of new spandex capacity had been put into operation as of May 2011, with the annually increased capacity expecting to surpass 100,000 tons.

Spandex Capacity in China, 2001-2011E (kt)



Source: China Chemical Fiber Association Information Center; ResearchInChina

In 2010, the spandex industry of China maintained high-speed growth, leading to domestic heavyweights to make intensified investment grasping market shares, thus accelerated the improvement of industrial concentration. In 2010, the top 10 spandex manufacturers in China made up 75.8% of the total capacity, up 2.1 percentage points comparing to that in 2009.

In 2010, foreign companies registered 20.8% in the spandex market of China in terms of capacity. Moreover, they are still accelerating the layout in Chinese spandex market by virtue of strength in economy and technology. A case in point was the phase IV project of Hyosung's Zhuhai plant, which was put into operation in May 2010. With the spandex capacity totaling 46,000 tons/year, Hyosung China became the largest spandex manufacturer in China in 2010.

In April 2011, with the 12,500 tons/year phase II project of Invista Foshan put into operation, the total spandex capacity of Invista China hit 41,000 tons/year.

Compared with foreign companies, China-based spandex manufacturers expand their capacity more rapidly, with the capacity proportion of the domestic top 5 spandex producers totaling 42.5% in 2010, up 2.5 percentage points over 2009.

Meanwhile, major domestic spandex enterprises are accelerating their steps to realize function-oriented differentiated development so as to improve their profitability. For example, Huaфон Spandex and Yantai Spandex realized the product differentiation rate above 50%.

Huaфон Spandex's 15,000-ton high-temperature resistant thin fabric spandex project with the investment of RMB480 million is under construction, expecting to be put into operation in July 2011, by then, the company will achieve a product differentiation rate over 60%, and regain the status as China's largest spandex manufacturer from Hyosung.

In 2010, the capacity of Yantai Spandex hit 27,000 tons, including 5,000 tons of increased capacity for medical use. Additionally, there is 7,000-ton comfort spandex capacity under construction expected to be put into operation in June 2011. By then, the product differentiation rate of the company is estimated to realize 60%, approximately.

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