This report

◆ Analyzes development of rubber auxiliary industry worldwide and China

◆ Focuses on the market segments of rubber auxiliary in China

◆ Highlights the operation of rubber auxiliary enterprises in China and worldwide, also make forecast and trends on rubber auxiliary industry

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Abstract

In recent years, the global rubber industry has been transferred eastwards. Coupled with robust drive of tire and other rubber products, the rubber auxiliary industry of China embraced a new round of construction and expansion upsurge during 2009-2010 following the investment fever happened in 2005-2006. In 2010, China’s new capacity input in rubber auxiliary industry reached approximately 120,000 tons, with the figure in 2011-2012 expecting to hit 200,000 tons.

With new equipment put into operation, the output of rubber auxiliary in China soared to 701,000 tons in 2010 from 180,000 tons in 2002, with the CAGR of 18.7%. In particular, the CAGR of rubber antioxidant 4020, rubber antioxidant 4010NA, rubber antioxidant RD, rubber accelerant NS and rubber accelerant CBS surpassed the industrial level.

CAGR of Major Rubber Auxiliaries in China, 2002-2010

<table>
<thead>
<tr>
<th>Product</th>
<th>CAGR</th>
</tr>
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<tbody>
<tr>
<td>Industry</td>
<td>18.7%</td>
</tr>
<tr>
<td>Rubber Antioxidant 4020</td>
<td>83.4%</td>
</tr>
<tr>
<td>Rubber Antioxidant 4010NA</td>
<td>54.1%</td>
</tr>
<tr>
<td>Rubber Antioxidant RD</td>
<td>28.0%</td>
</tr>
<tr>
<td>Rubber Accelerant NS</td>
<td>36.8%</td>
</tr>
<tr>
<td>Rubber Accelerant CBS (CZ)</td>
<td>20.9%</td>
</tr>
<tr>
<td>Rubber Accelerant M</td>
<td>14.6%</td>
</tr>
</tbody>
</table>

Source: Rubber Auxiliary Committee of China Rubber Industry Association
In order to build the image as a global leader in the field of PPD rubber auxiliary, the company launched the rubber antioxidant capacity expansion project in July 2009. In particular, the phase I project with total investment of RMB 1 billion and an annual capacity of 50,000 tons of rubber antioxidant intermediate RT base (4-ADPA) and 40,000 tons of rubber antioxidant 4020 (6PPD) was put into operation in Sep. 2010, while the phase II 20,000 tons/year rubber antioxidant 4020 (6PPD) production line started construction in Mar. 2011.

Shandong Sunsine Chemical Co., Ltd. is a leader in China’s rubber accelerant industry, with its 90% revenue from rubber accelerant business. Its core products include accelerant NS/CBS/M. Its output of rubber auxiliary in 2009 hit 44,000 tons, with the revenue realizing RMB704 million. And the output in 2010 recorded 53,000 tons, with the revenue increased by 53.4% yr-on-yr.

Shandong Yanggu Huatai Chemical Co., Ltd. is mainly engaged in the production of scorch retarder, vulcanization accelerator, plasticizer, etc, with the current capacity of 10,000 tons of scorch retarder CTP, 10,000 tons of accelerator NS and 4,000 tons of plasticizer A. In particular, scorch retarder CTP ranks No.1 in China and even the world. In 2010, the revenue of the company registered RMB348 million, of which, 60.8%, 21.0% and 7.8% were attributable to scorch retarder CTP, vulcanization accelerator NS and plasticizer A respectively.

The rapid growth of phenylenediamine rubber antioxidant 4010NA/4020 and quinoline rubber antioxidant RD in recent years is mainly attributable to their advantages including low toxicity, high efficiency and low pollution which coincide with the call for low carbon emission and environmental protection in today’s society. As rubber accelerator NS and rubber accelerator CBS both don’t produce nitrous acid, a carcinogen, they have been widely applied in various fields. Rubber accelerator M is not only an accelerator itself, but also functions as raw material of accelerator DM and sulfonamide accelerator. Thus the market demand is considerable.

The report analyzes the status quo of domestic and overseas rubber auxiliary market, and highlights four international heavyweights including Flexsys, Lanxess, Chemtura and Agrofert as well as eleven domestic key manufacturers such as Shandong Yanggu Huatai Chemical Co., Ltd., Jiangsu Sinorgchem Technology Co., Ltd. and Shandong Sunsine Chemical Co., Ltd.

Jiangsu Sinorgchem Technology Co., Ltd. is the largest rubber antioxidant 6PPD/IPPD and intermediate RT base producer in China, with the revenue in 2010 realizing RMB2.5 billion, a year-on-year increase of 13.6%.
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