



Global and China Titanium Dioxide Industry Report, 2010-2015

August 2011

This report

- ◆ **Analyzes development of Titanium Dioxide industry worldwide and China**
- ◆ **Focuses on the market pattern and Titanium Dioxide industry chain**
- ◆ **Highlights the operation of Titanium Dioxide enterprises in China and worldwide, also development trend forecast and investment advice**

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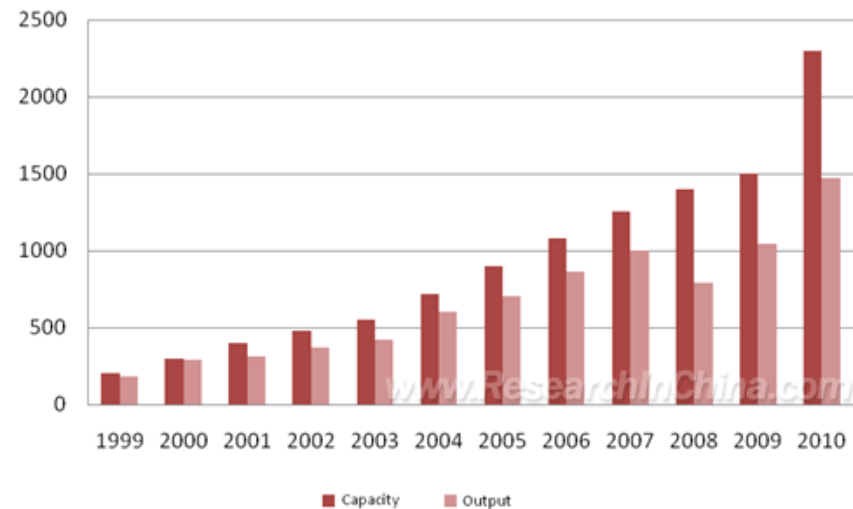
Global and China Organic Silicon Industry Report, 2010-2011

Abstract

Over the past decade, global titanium dioxide industry has maintained stable development on the whole. Affected by the financial crisis, the capacity of titanium dioxide shrank around the world in 2008. However, driven by the recovery of paint, papermaking, plastic and other application industries in the downstream, titanium dioxide industry has witnessed robust growth since the end of the second quarter of 2009.

In 2010, the titanium dioxide in global market was in tight supply and the market price rocketed as well. Therefore, China's titanium dioxide began to present its price advantage in the international market and the export volume significantly increased, which led to the short supply and soaring price of titanium dioxide as well as capital increase and production expansion of titanium dioxide enterprises in China. The total output of domestic titanium dioxide hit historical record of 1,472,000 tons in 2010, up 425,000 tons compared with that in 2009, with the growth rate of 40.8%. Meanwhile, the capacity of titanium dioxide in China reached 2,300,000 tons in 2010.

Capacity and Output of Titanium Dioxide in China, 1999-2010
(Unit: kiloton)



Source: ResearchInChina

Since 2010, both Chinese and world economy began to witness stability and recovery. But the recovery is not based on solid foundation and there are still a lot of uncertainties. If the world economy falls into a double-dip recession, the market price of titanium dioxide may again experience irrational fluctuations.

Shandong Dongjia: with capacity of 160,000 tons of titanium dioxide per year, the company produces more than 10 types of rutile titanium dioxide and titanium dioxide for chemical fiber including SR-235S, R-235, SR-235, SR-235 and BA01-01. In 2010, Shandong Dongjia Group produced 116,000 tons of titanium dioxide, attaining year-on-year growth of 19.65%, and achieved sales revenue of RMB 1.443 billion, up 28.34% YoY. Between 2004 and 2010, the Group ranked first in terms of both output and sales volume of titanium dioxide in China for seven consecutive years.

Henan Billions: In 2010, its export volume of titanium dioxide reached 51,900 tons, ranking first in China for three consecutive years. Billions mainly produced high value-added rutile titanium dioxide instead of anatase type in 2010.

Sichuan Lomon: the company can produce 80,000 tons of rutile titanium dioxide per year and its main products are R996 and other high-end general-grade rutile titanium dioxide. From 2007 to 2010, Sichuan Lomon had been expanding its capacity of titanium dioxide, and its output grew to 100,700 tons in 2010 from 63,800 tons in 2007, with CAGR of 16.43%.

Anhui Annada: established in March 2005, it is the largest titanium dioxide manufacturer in Anhui Province. In 2010, its output and sales volume of titanium dioxide increased by 49.0% and 37.77% respectively compared with those in 2009. Compared with its peers, Annada takes the upper hand in sulfuric acid supply, transportation, procurement price and transportation costs.

CNNC Huayuan Titanium Dioxide: the company was founded in 1989, with registered capital of RMB 190 million. It went public on Shenzhen Stock Exchange in 2007. In 2010, its output of titanium dioxide grew by 148.26% YoY, and net income rose by 107.36% YoY to RMB 10,965,900.

Pangang Group Steel Vanadium & Titanium: its current capacity is 50,000 tons per year and it produces more than 10 types of rutile and anatase titanium dioxide including R-244, R-248, R-258 and A-111. Its output of titanium dioxide accounted for 4.25% of Chinese market in 2010.

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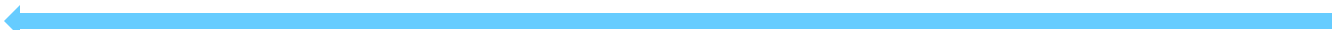
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