



China Polymer Foam Material Industry

Report, 2010-2011

August 2011

This report

- ◆ **Analyzes development of Polymer Foam Material Industry in China**
- ◆ **Focuses on the market segment of Polymer Foam Material Industry**
- ◆ **Highlights the operation of Polymer Foam Material Industry enterprises in China**

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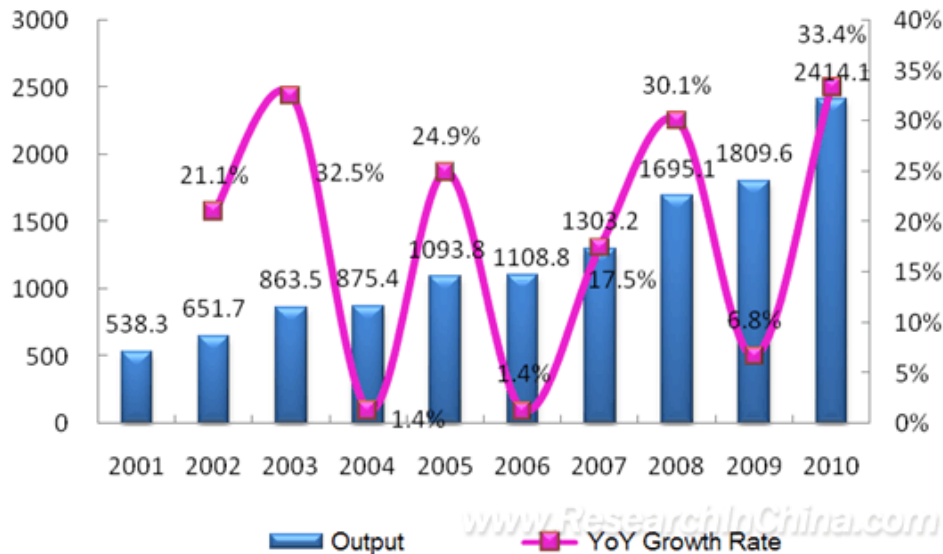
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Abstract

China polymer foam materials industry develops rapidly, especially the average annual growth rate of foam plastic output was 18.1% from 2001 to 2010, and the output in 2010 hit 2.414 million tons which accounted for 2 / 3 of Chinese polymer foam materials market.

Foam Plastic Output and YoY Growth Rate in China, 2001-2010
(Unit: Kt, %)



Source: ResearchInChina

In China, there are numerous polymer foam materials production enterprises, but most of them are SMEs. The industry features fierce competition. The number of just foam plastic manufacturers registered above 1,200 in 2010. Although China polymer foam materials industry has been mature, domestic producers mainly focus on medium and low-end products, some high-end products are still imported. The unit price of imports differs greatly from that of exports. For example, in 2010, the import unit price of expanded polyurethane plastic was USD11,036.8/ton, while the export unit price was USD5,178.9/ ton, the former doubled the latter.

According to the difference among raw materials, polymer foam materials can be divided into expandable polyurethane (EPU), expandable polystyrene (EPS), expanded ethylene-vinyl acetate copolymer (EVA), expandable polypropylene (EPP), expandable polyethylene (EPE), etc.

1. EPU

EPU finds application mainly in such sectors as refrigeration, building insulation and solar water heater. Fueled by policies, the demand from Chinese markets of building insulation and solar water heater for EPU will present significant growth.

Nanjing Hongbaoli and Guangdong Wanhua Rongwei Polyurethane are the key producers of polyurethane hard foam combined materials in China, of which the former boasts the largest production capacity 90 kilotons in China, with the 60-kiloton hard foam combined polyether project under way and its market shares to be expanded after the project puts into production; while the latter is a subsidiary of Yantai Wanhua and is the sole manufacturer which can independently produce polyurethane hard foam combined materials, with conspicuous cost advantage.

2. EPS

In recent years, the EPS industry of China expands exceedingly fast, causing overcapacity and fierce competition. In 2010, China's capacity of EPS exceeded 4 million tons, but the real output registered less than 2.5 million tons, with the operating rate merely 62.5%. It is expected that, in the next a few years, the oversupply of EPS in China is still hard to ease and the operating rate will continue to be constrained.

Loyal Group and Wuxi Xingda Group are the EPS manufacturers ranking first and second by capacity respectively in China. In 2010, the production capacities of the two reached 1.34 million tons and 990,000 tons, separately. Besides, they both have the EPS project under construction, and the production capacities of them will continue to grow.

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