



Global and China Organic Silicon Industry Report, 2011-2012

Jun 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include National Bureau of Statistics of China, China Customs and industry association etc.

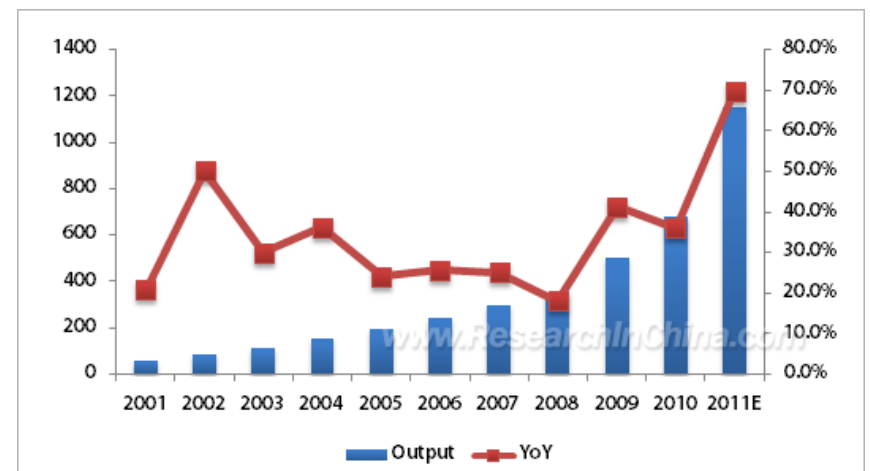
Abstract

China organic silicon industry in 2011 showed poor performance overall, primarily influenced by the oversupply and product singularity of the upstream organic silicon monomer market.

On the one hand, the built capacity of organic silicon in China reaches 1.8 million t/a, with apparent consumption of organic silicon monomer approximating 1.26 million tons in 2011, while currently, China's organic silicon monomer capacity under construction has also outnumbered 800,000 tons, thus the overcapacity problem will persist in the next few years.

On the other hand, due to the single product structure, Chinese organic silicon monomers are mainly concentrated in the field of traditional methyl chlorosilane products, while phenyl chlorosilane and other new types of high-performance organic silicon monomers have less capacity, thereby imposing obvious restrictions on the development of downstream organic silicon deep-processing sectors such as silicone rubber, silicone oil, coupling agent, etc..

Output of China Organic Silicon Monomer, 2001-2011 (Unit: kt)



Source: ResearchInChina: Global and China Organic Silicon Industry Report, 2011-2012

In 2011, under the circumstance of the market price downturn of organic silicon monomer products, Bluestar New Chemical Material Co., Ltd., Zhejiang Xinan Chemical Industrial Group Co., Ltd. and other organic silicon monomer business-oriented enterprises presented a significant decline in profitability. In contrast, downstream organic silicon deep-processing manufacturers like Hubei Huitian Adhesive Enterprise Co., Ltd and Chengdu Guibao Science and Technology Co., Ltd still maintain high profitability. In this case, the investment in Chinese organic silicon industry has been transferred towards downstream. In addition to Chengdu Guibao Science and Technology Co., Ltd, Guangzhou Baiyun Chemical Industry Co., Ltd. and other traditional organic silicon deep-processing enterprises, new project investments of upstream ones such as Bluestar New Chemical Material and Zhejiang Xinan Chemical Industrial Group also focus on deep-processing products.

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