



**Global and China Rubber Auxiliary Industry  
Report, 2011-2012**

**Jul. 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 China Rubber Industry Association, WIND and China Custom etc.

## Abstract

Due to the sluggish demand in the global market, the development of rubber auxiliary industry of China suffered a setback in 2011, with the output and sales increasing by 8.0% and 8.3% year on year respectively, a decrease of 9.8 percentage points and 23.1 percentage points compared with the previous year.

Rubber antioxidant and rubber accelerator are two hit products in China's rubber auxiliary industry, with the combined output in 2011 hitting 552,600 tons or 73.0% of the total output of rubber auxiliary in China. In particular, phenylenediamine 4020 series and quinoline series RD are superior varieties among all the rubber antioxidants, with the output approaching 80% of the total output of rubber antioxidants; while sulfonamide CZ, NS and thiazole M, DM are major rubber accelerator products, with the output exceeding 70% of the total. In addition, the output of insoluble sulfur, as the major vulcanizer of radial tire, approached 50,000 tons in 2011 driven by the new and expansion projects.

In recent years, the production technology of rubber auxiliaries has seen increasingly improvement in China. Thanks to the Cleaner Production Policy, China has developed a series of energy-saving and environmental-friendly technologies including accelerant NS oxygen oxidation process, NS wastewater treatment and water resource comprehensive utilization technology, 10,000-ton-level high temperature stable insoluble sulfur technology, 10,000-ton level pre-dispersed rubber auxiliary production technology, etc.

Moreover, a host of large-scale enterprises with intensive management have emerged in China. In 2011, enterprises with the sales exceeding RMB500 million numbered 7, with the sales making up 31.9% of the total sales of the rubber auxiliary industry. In particular, Jiangsu Sinorgchem Technology, the largest PPD rubber antioxidant business in China, ranked the No. 1 place, with the sales surpassing RMB2.5 billion in 2011.

Furthermore, many competitive enterprises have also emerged in the fields of rubber accelerator, processing aid and insoluble sulfur in China.

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At present, Shandong Sunshine Chemical boasts the flagship enterprise in the rubber accelerator industry of China. Listed in Singapore in 2007, the company specializes in the production of rubber accelerator and has been expanding to the fields of antioxidant and insoluble sulfur in recent years.

Shandong Yanggu Huatai Chemical is regarded as the largest scorch retarder CTP manufacturer in China. In 2012, the company put 10,000-ton CTP into production, increasing the capacity of scorch retarder to 20,000 tons. Subsequently, 15,000-ton rubber auxiliary M, 10,000-ton NS and 10,000-ton CBS projects were put into production, which largely increased its capacity.

The for-rubber-use insoluble sulfur market of China has long been monopolized by the America-based Flexsys. In February 2012, the first 10,000-ton-level insoluble sulfur production line independently designed and produced by Jiangxi Hengxingyuan Chemical was formally put into production, ending the monopoly of foreign enterprises. Furthermore, Jiangxi Hengxingyuan Chemical is scheduled to increase the output of insoluble sulfur to 20,000 tons in 2012 and land on the SME board of Shenzhen Stock Exchange in 2013.

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