



China AC Foaming Agent Industry Report, 2012-2014

Nov. 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 Wind Information, and China Chlor-Alkali Industry Association etc.

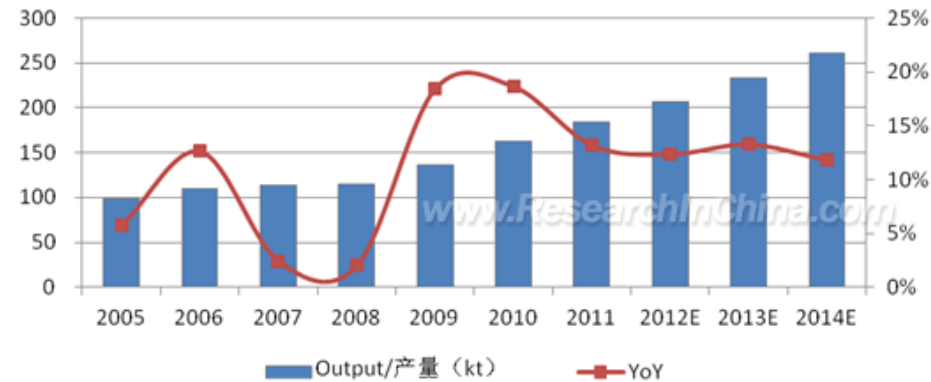
Abstract

Azodicarbonamide (AC) foaming agent, also known as ADC foaming agent, is a widely used organic thermal decomposition foaming agent with the largest gas evolution and the most superior performance.

In recent years, the AC foaming agent production capacity and output have increased continuously in China, with CAGRs of 7.96% and 10.70% in 2006-2011 respectively. In 2011, the total capacity and output of AC foaming agent reached 220,000 tons and 183,700 tons in China respectively. With the continuous development of traditional application fields like the footwear industry and the leather industry as well as the rapid growth of emerging application fields like the rubber and plastic heat insulation material industry, the demand for AC foaming agent has been prosperous, and the output will maintain a growth rate of more than 10% in the next three years.

The raw materials for the production of AC foaming agent mainly include caustic soda, urea and chlorine. AC foaming agent enterprises mainly produce chlorine and caustic soda using their own chlor-alkali production facilities, and purchase urea from other enterprises. China's urea and caustic soda market is currently oversupplied, which is

Output and YoY Growth Rate of AC Foaming Agent in China, 2005-2014



Source: ResearchInChina China AC Foaming Agent Industry Report, 2012-2014

conducive to the cost control of AC foaming agent. In recent years, affected by government policies, China's urea export has been reduced, and the oversupply in the urea market has become increasingly serious. In 2011, China's urea output reached 26.57 million tons, up 5.6% year on year, and the apparent consumption was 23 million tons, of which industrial urea accounted for 20%. In 2004-2011, China's caustic soda production capacity increased rapidly, with a CAGR of 16.2%.

In 2011, the designed production capacity of top 3 enterprises, i.e. SOPO Group, Selon Industrial and Ningxia Risheng, accounted for 59.1% of the total capacity of AC foaming agent in China. With the rapid development of the AC foaming agent market, major AC foaming agent manufacturers have increased capital investment to expand production capacity. At the end of 2011, Nanchang Instyle Chlorin and Alkali Co., Ltd. started the construction of its Phase I relocation project, involving 100 kt/a caustic soda and 20 kt/a ADC foaming agent production capacity, which is expected to start production in 2013; in December 2009, Fujian Longyan Longhua Chemical Co., Ltd. started the construction of a capacity expansion project involving 160 kt/a ion exchange membrane caustic soda and 25 kt/a AC foaming agent production capacity, with total investment of RMB1.24 billion. Phase I project is expected to be put into production in Q1 2013.

China AC Foaming Agent Industry Report, 2012-2014 of ResearchInChina mainly covers the followings:

- Supply and demand, enterprise competition, price analysis, development prospects of China's AC foaming agent industry;
- Supply and demand, import and export, competition, development trends of upstream sectors (urea, caustic soda, etc.) of China's AC foaming agent industry;
- Supply and demand, import and export, competition, development prospects of downstream sectors (footwear, leather, etc.) of China's AC foaming agent industry;
- Operation, AC foaming agent business and development of 10 AC producers.

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