



Global and China Silica (White Carbon Black)
Industry Report, 2013

June 2013

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 Company Reports, and National Bureau of Statistics of China etc.

Abstract

Silica (white carbon black), according to the production process, is often called fumed silica and precipitated silica. More than 90% of silica products in China are precipitated silica.

While abroad, fumed silica manufacturers occupy the vast majority; silica products are of high quality and reasonable structure and with more environmentally friendly production process. Major manufacturers include Rhodia, Evonik Industries, PPG Industries, Cabot, Wacker Chemie AG and Tokuyama Corporation. So far, these multinational companies have all set up factories in China, with capacity being at the forefront of the industry, of which, Cabot Bluestar Chemical (Jiangxi) Company Limited as the largest producer of fumed silica in China has production capacity of 15,000 tons.

As of 2012, China has been the world's largest producer of silica, with capacities of precipitated silica and fumed silica up to approximately 1.5 million tons and 55,000 tons, respectively, of which, Wuxi Quechen Silicon Chemical Co., Ltd. relying on 180,000-ton precipitated silica ranks first. Influenced by the downstream rubber industry downturn and the decline in exports, Chinese silica manufacturers have suspended production to relieve inventory pressure, resulting in a slight decrease in domestic production, down to about 1.35 million tons.

Global Silica Producers' Layout in China

Producer	Company in China	Nature	Capacity (kt)
Rhodia	Rhodia Silica Qingdao Co., Ltd.	Sole Proprietorship	72
Evonik Industries	Evonik Wellink Silica (Nanping) Co., Ltd.	Sino-German	100
Cabot	Cabot Bluestar Chemical (Jiangxi) Company Limited	Sino-U.S.	15
Wacker Chemie	Wacker Chemicals (Zhangjiagang) Co., Ltd.	German-U.S.	-
Tokuyama	Tokuyama Chemicals (Zhejiang) Co., Ltd.	Japanese-owned	10

Source: ResearchInChina Global and China Silica (White Carbon Black) Industry Report, 2013

From the downstream demand, 71% of Chinese precipitated silica products are consumed in the field of rubber e.g. shoemaking, tire and silicone rubber. Shoemaking as a traditional application area for precipitated silica will keep stable demand. With the formal implementation of EU Tyre Labeling Act on November 1, 2012, precipitated silica especially highly dispersed precipitated silica of China (EU's major tire exporter) will be benefited following the growth of the green tire industry.

Global and China Silica Industry Report, 2013 by ResearchInChina mainly covers the followings:

- Supply and demand situation of the global silica industry;
- Product structure, precipitated and fumed silica capacity, production, import and export of China silica industry;
- Consumption structure and downstream applications of China silica industry, involving market situation as well as silica usages in footwear, tire, silicone rubber, pesticide & feed, coating and toothpaste.
- Operation, silica business and development-in-China of the world's six leading producers;
- Operation, silica business, key projects, etc. of 11 precipitated silica producers and six fumed silica producers in China.

Preface

1. Overview of Silica Industry

- 1.1 Definition and Classification
- 1.2 Applications
- 1.3 Industry Policy

2. Development of Global Silica Industry

- 2.1 Supply
- 2.2 Demand

3. Development of China Silica Industry

- 3.1 Product Structure
- 3.2 Capacity
- 3.3 Output
- 3.4 Import and Export

4. Downstream Applications of China Silica Industry

- 4.1 Consumption Structure
- 4.2 Footwear
- 4.3 Tire
- 4.4 Silicone Rubber
- 4.5 Pesticide & Feed
- 4.6 Coating
- 4.7 Toothpaste
- 4.8 Summary

5. Key Companies in the World

- 5.1 Rhodia
 - 5.1.1 Profile
 - 5.1.2 Silica Business
 - 5.1.3 Operation
 - 5.1.4 Development in China
- 5.2 Evonik
 - 5.2.1 Profile
 - 5.2.2 Operation
 - 5.2.3 Evonik Expands US Production of P
recipitated Silica
 - 5.2.4 Development in China
- 5.3 PPG
 - 5.3.1 Profile
 - 5.3.2 Operation
 - 5.3.3 PPG Increases Precipitated Silica Capacity in
North America
- 5.4 Cabot
 - 5.4.1 Profile
 - 5.4.2 Silica Business
 - 5.4.3 Operation
 - 5.4.4 Major Events
 - 5.4.5 Cabot Bluestar Chemical (Jiangxi) Company
Limited
- 5.5 Wacker Chemie
 - 5.5.1 Profile
 - 5.5.2 Silica Business
 - 5.5.3 Operation
 - 5.5.4 Wacker Chemicals (Zhangjiagang) Co., Ltd.

5.6 Tokuyama

- 5.6.1 Profile
- 5.6.2 Silica Business
- 5.6.3 Operation
- 5.6.4 Tokuyama Chemicals (Zhejiang) Co., Ltd.

6. Key Companies in China

Precipitated Silica Producers

- 6.1 Tong Hua Shuang Long Chemical Co., Ltd.
 - 6.2 Do-fluoride Chemicals Co., Ltd.
 - 6.3 Shandong Haihua Company Limited
 - 6.4 Longxing Chemical Stock Co., Ltd.
 - 6.5 Shanxi Tond Chemical Co., Ltd.
 - 6.6 Shandong Link Silica Co., Ltd.
 - 6.7 Zhuzhou Xinglong Chemical Industrial Co., Ltd.
 - 6.8 Wuxi QueChen Silicon Chemical Co., Ltd.
 - 6.8.1 Profile
 - 6.8.2 Development Course
 - 6.9 Fujian Zhengsheng Inorganic Materials Co., Ltd.
 - 6.10 Sanming City Fengrun Chemical Industry Co., Ltd.
 - 6.11 Jinsha Silica Manufacturing Co., Ltd.
- Fumed Silica Producers
- 6.12 Guangzhou GBS High-tech & Industry Co., Ltd.
 - 6.13 Yichang CSG Polysilicon Co., Ltd.
 - 6.14 Zhejiang Fushite Group
 - 6.15 China Silicon Corporation Ltd
 - 6.16 Shenyang Chemical Co., Ltd.
 - 6.17 Jiangxi Black Cat Carbon Black Co., Ltd.

- Classification of Silica
- Main Applications of Silica
- Regulations and Policies on Silica Industry in China, 2005-2013
- Product, Process, Capacity and Product Bases for Major Silica Producers in the World
- Silica Expansion Projects in the World, 2010-2013
- Global Silica Producers' Layout in China
- Consumption Structure of Global Precipitated Silica Market
- Demand for Silica in USA, 2003-2018
- Product Structure of Silica Market in China, 2012
- Region Distribution of Silica Production in China (by Capacity)
- Classification of Silica Market in China
- Structure of Silica Producers in China (by Capacity)
- Precipitated Silica Producers' Capacities in China, 2012
- Fumed Silica Producers' Capacities in China, 2012
- Main Silica Projects in China
- Silica Output and YoY Change in China, 2004-2016E
- Import Volume and Export Volume of Silicon Dioxide in China, 2001-2013
- Average Prices for Import and Export of Silicon Dioxide in China, 2000-2013
- Consumption Structure for Precipitated Silica in China
- Consumption Structure for Fumed Silica in China
- Output and Its YoY Growth Rate of Leather footwear in China, 2000-2013
- Output and Its YoY Growth Rate of Rubber Tire Casting, 2007-2013
- Output and Its YoY Growth Rate of Radial Tire Casting, 2007-2013
- Precipitated Silica Consumption Used in HTV Silastic Industry in China, 2009-2012

- Output and Its YoY Change of Chemical Pesticide in China, 2000-2013
- Feed Output and YoY Change in China, 2000-2013
- Coating Output and YoY Change in China, 2003-2013
- Main Operating Indicators of Rhodia, 2011-2012
- Profile of Evonik Industries
- Production Bases of Inorganic Materials of Evonik in the World
- Sales Structure of Evonik (by Business), Q1 2013
- Main Operating Indicators of Evonik, 2008-2012
- Main Operating Indicators of Evonik, 2012-2013
- Main Operating Indicators for Resource Efficiency of Evonik, 2011-2012
- Main Operating Indicators for Resource Efficiency of Evonik, 2012-2013
- Revenue of Resource Efficiency of Evonik, 2008-2012
- Sales of PPG, 2008-2012
- Sales Structure of PPG (by Business), 2012
- Main Operating Indicators for Optical and Specialty Materials of PPG, 2012-2013
- Silica Production Bases of PPG in the World
- Global Business of Cabot
- Main Operating Indicators of Cabot, FY2010-FY2012
- Revenue Structure of Cabot (by Business), FY2010-FY2013
- Revenue and EBIT for Performance Materials of Cabot, FY2010-FY2012
- Revenue and EBIT for Performance Materials of Cabot, FY2013
- Silica Production Bases of Wacker Chemie in the World
- Revenue of Wacker Chemie, 2008-2012
- Revenue of Wacker Chemie, 2012-2013
- Revenue and EBITDA of Wacker Chemie (by Business), Q1 2013

- Revenue Structure of Wacker Chemie (by Region), 2013
- Global Business of Tokuyama
- Introduction to Silica Products of Tokuyama
- Revenue of Tokuyama, FY2004-FY2013
- Revenue and Profit of Specialty Products of Tokuyama, FY2011-FY2012
- Profile of Tokuyama Chemicals (Zhejiang) Co., Ltd.
- Main Silica Products and Applications of Tong Hua Shuang Long Chemical
- Output and Sales Volume of Tong Hua Shuang Long Chemical, 2007-2013
- Revenue and Net Income of Tong Hua Shuang Long Chemical, 2008-2013
- Integrated Gross Margin of Tong Hua Shuang Long Chemical, 2008-2012
- Revenue Structure of Tong Hua Shuang Long Chemical (by Product), 2008-2012
- Revenue Structure of Tong Hua Shuang Long Chemical (by Region), 2008-2012
- R&D Costs and % of Total Revenue of Tong Hua Shuang Long Chemical, 2008-2012
- Key R&D Projects of Tong Hua Shuang Long Chemical, 2012
- Major Projects of Tong Hua Shuang Long Chemical
- Designed Capacity of 20000t High Dispersive Precipitated Silica Project of Tong Hua Shuang Long Chemical
- Revenue and Net Income of Tong Hua Shuang Long Chemical, 2013E-2016E
- Revenue and Net Income of Do-fluoride Chemicals, 2008-2013
- Revenue Structure of Do-fluoride Chemicals (by Product), 2008-2012
- Revenue Structure of Do-fluoride Chemicals (by Region), 2008-2012
- Revenue and Net Income of Shandong Haihua Company Limited, 2008-2013
- Revenue of Sodium Silicate and Silica and % of Total Revenue of Shandong Haihua Company Limited, 2010-2012
- Revenue and Net Income of Longxing Chemical Stock, 2008-2013
- Silica Projects of Longxing Chemical Stock
- Revenue and Net Income of Shanxi Tond Chemical, 2009-2013

- Silica Revenue, Gross Margin and % of Total Revenue of Shanxi Tond Chemical, 2009-2012
- Output, Sales Volume and Inventory of Silica of Shanxi Tond Chemical, 2011-2012
- Capacity, Output and Sales Volume of Silica of Shandong Link Silica, 2009-2012
- Main Operating Indicators of Shandong Link Silica, 2009-2012
- Operating Revenue and Gross Margin of Shandong Link Silica, 2009-2012
- Sales Structure of Shandong Link Silica (by Region), 2009-2012
- Development Course of Wuxi QueChen Silicon Chemical
- Marketing Network of Fujian Zhengsheng Inorganic Materials
- Development Course of Yichang CSC Polysilicon
- Revenue and Net Income of Shenyang Chemical, 2008-2013
- Revenue and Net Income of Black Cat Carbon Black, 2008-2013
- Silica Revenue, Gross Margin and % of Total Revenue of Black Cat Carbon Black, 2011-2012

You can place your order in the following alternative ways:

1. Order online at www.researchinchina.com
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: report@researchinchina.com
4. Phone us at +86 10 82600828/ 82601561

Party A:			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

Party B:			
Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
Address:	Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080		
Contact Person:	Liao Yan	Phone:	86-10-82600828
E-mail:	report@researchinchina.com	Fax:	86-10-82601570
Bank details:	Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng, Landianchang, Haidian District, Beijing Bank Account No #: 110060668012015061217 Routing No #: 332906 Bank SWIFT Code: COMMCNSHBJG		

Title	Format	Cost
<i>Total</i>		

Choose type of format

- PDF (Single user license)1,900 USD
- Hard copy 2,000 USD
- PDF (Enterprisewide license)..... 3,000 USD

※ Reports will be dispatched immediately once full payment has been received.
Payment may be made by wire transfer or credit card via PayPal.