



**Global and China Rubber Auxiliary Industry
Report, 2012-2013**

July 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

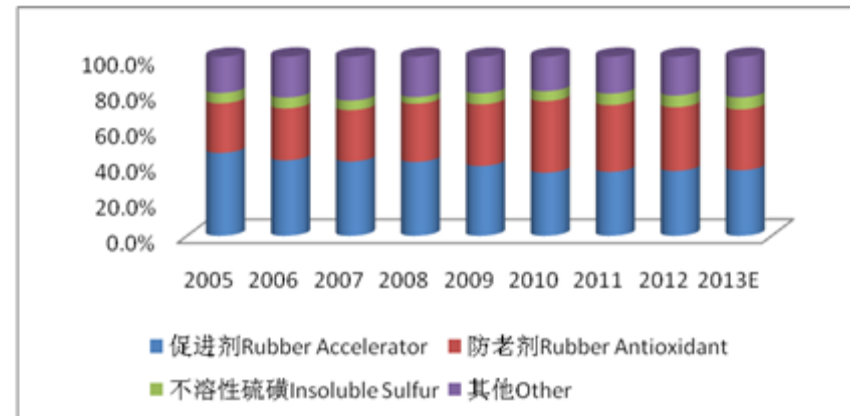
In 2012, China rubber auxiliary industry saw stable growth, with the annual output surging by 8.35% year-on-year to 820,500 tons, China Rubber Industry Association said, adding that the output of accelerant registered 297,300 tons and the antioxidant output 292,200 tons, respectively, up 9.8% year-on-year and 3.6% year-on-year, while the export volume amounted to 239,000 tons, accounting for 29.1% of the total output.

2013 continues to see an adverse economic dynamic, but there is a great possibility to witness vibrant domestic demand. Coupled with steady advance of automobile, tire and other downstream sectors, China rubber auxiliary industry is predicted to maintain a growth rate between 8.0%-9.0% all the year round.

The report touches on the status quo of the rubber auxiliary industry, highlights the market segments like antioxidant, accelerant, and insoluble sulfur, and analyzes 16 key companies at home and abroad.

At present, the two hit rubber auxiliary products, antioxidant and accelerant, collectively make up over 70% in China rubber auxiliary market, while others including insoluble sulfur, processing aids and bonding system auxiliaries stand at less than 30% market share.

Rubber Auxiliary Products Structure in China by Output, 2005-2013



Source: China Rubber Industry Association; ResearchInChina Global and China Rubber Auxiliary Industry Report, 2012-2013

China has a great many of large-sized rubber auxiliary producers including Jiangsu Sinorgchem Technology Co.,Ltd., Shandong Sunshine Chemical Co.,Ltd., Shandong Yanggu Huatai Chemical Co., Ltd., Kemai Chemical Co.,Ltd. and Puyang Wiling Chemicals Co.,Ltd.

Jiangsu Sinorgchem Technology Co.,Ltd. boasts the world's largest rubber antioxidant and intermediate maker, with the capacity of 100,000-ton 6PPD, 120,000-ton p-aminodiphenylamine (PADPA) and 10,000-ton IPPD. In 2012, Sinochem International Corporation took over 60.976% stake of Jiangsu Sinorgchem Technology Co.,Ltd., making it become the majority shareholder.

Shandong Sunshine Chemical Co.,Ltd. is equipped with a couple of product series including rubber antioxidant, rubber accelerator, rubber vulcanizing machine, and rubber pre-dispersants. In 2010-2012, the company accumulatively projected RMB124.7 million for technological innovation and product R&D, and developed new technologies of NS new products, DM-based new production technology, compound solvent process high-thermostable insoluble sulfur technology, etc.

Shandong Yanggu Huatai Chemical Co., Ltd. is the first listed rubber auxiliary company in China. The company's intensive commissioning of scorch retarder CTP, accelerant NS, accelerant CBS, accelerant M, rubber masterbatch and insoluble sulfur as part of its long-term planning in 2012H2 will boost the business performance in 2013 considerably.

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