

China Printing and Dyeing Auxiliary Industry Report, 2014-2017

Sep. 2014

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.

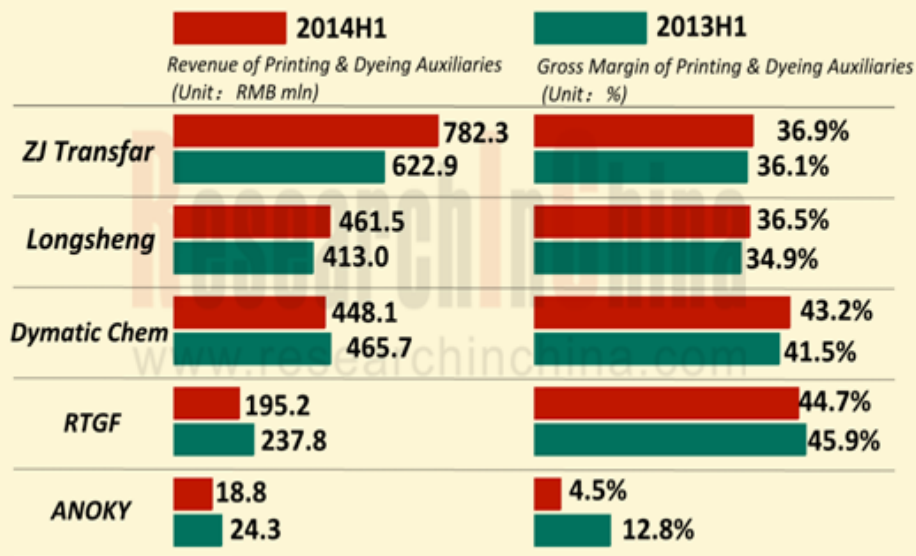
Abstract

Printing and dyeing auxiliaries are crucial for the upgrading and generation replacement of textile products and the growth of added value. In 2006-2012, China's printing and dyeing auxiliary output showed an uptrend with a CAGR of 8.8%. In 2013, the output reached 1.366 million tons, representing a slight increase over 2012.

China printing and dyeing auxiliary industry does not depend on import, but it has to introduce special and upscale auxiliaries from other countries frequently. Benefiting from technological progress, China's import volume of textile auxiliaries embodied a downward trend in 2008-2013. From January to July of 2014, China imported 16,300 tons of textile auxiliaries, down 6.6% year on year.

In 2013, there were 2,000-3,000 production enterprises in China printing and dyeing auxiliary industry, mainly located in Jiangsu, Zhejiang, Guangdong, Shandong, Fujian and other coastal areas. In the same year, these five above provinces contributed 90% or so to the total capacity of printing and dyeing auxiliaries in China.

Revenue from and Gross Margin of Printing and Dyeing Auxiliaries of Listed Companies in China, 2013H1 vs. 2014H1



Source: China Printing and Dyeing Auxiliary Industry Report, 2014-2017

Zhejiang Transfar and Dymatic Chemicals are leading enterprises in China printing and dyeing auxiliary industry, with the market share of around 10%. In 2009-2014, both of them see their gross margin of dyeing auxiliaries at over 30% with an increasing trend. Zhejiang Transfar seeks for new growth engines by extending to butadiene rubber business; meanwhile, Dymatic Chemicals continues to consolidate its position in the industry through developing high-end products such as low-temperature bleaching and anti-staining cleaning products.

In the wake of increasingly stringent environmental policies, the backward capacity of the printing and dyeing auxiliary industry will be gradually eliminated and the concentration degree of the industry is to jump. At present, China's printing and dyeing auxiliaries account for 3% of textile fibers, lower than 7% in developed countries, which marks China's huge potentials. China's output of printing and dyeing auxiliary is expected to hit 1.693 million tons in 2017.

The report includes the following:

- Policy, supply, demand, competition pattern, import & export, and development forecast of China printing and dyeing auxiliary industry;
- Operation, supply, demand, investment, import & export and development prediction of China printing and dyeing industry;
- Operation, printing and dyeing auxiliary business, and development forecast of nine printing and dyeing auxiliary producers in China;
- Operation, printing and dyeing business, and development forecast of three printing and dyeing enterprises in China.

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