



**Global and China Silica (White Carbon
Black) Industry Report, 2014-2017**

Nov. 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.

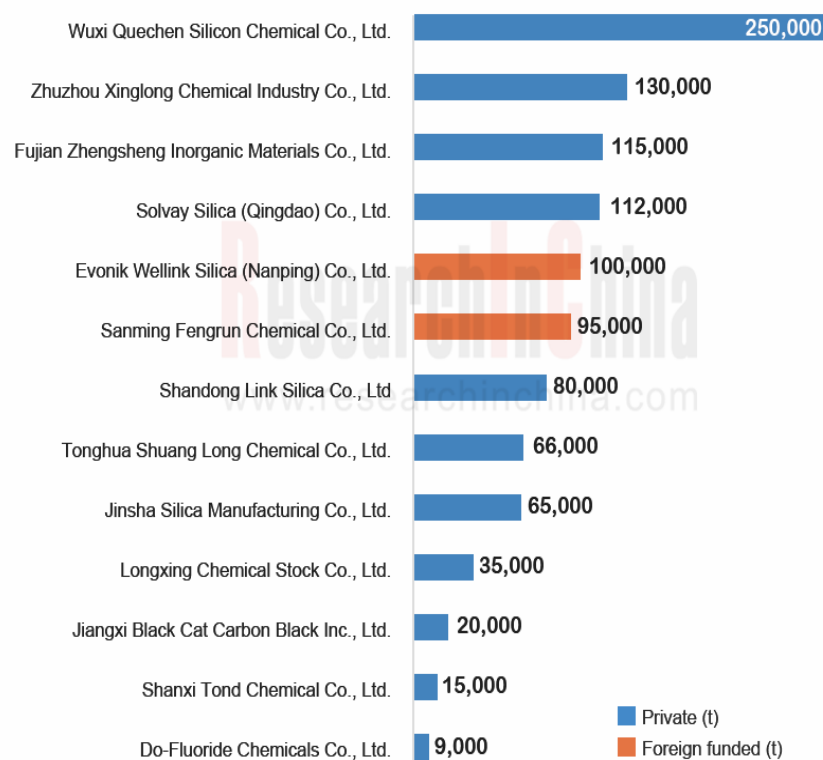
Abstract

China, the world's largest silica producer, had silica capacity of 2.20 million tons in 2013, slowing to a year-on-year increase of 8.1% and accounting for 60% of global capacity, of which 2.079 million tons were precipitated silica and 118,000 tons fumed silica, rising by 7.44% and 21.15% from a year earlier, respectively.

Ever-increasing silica capacity is attributed mainly to the increase in downstream demand, especially that of green tire and silicone rubber and the commissioning of expanded projects of producers.

In March, 2013, the LPS & HDS silica production lines in Wuxi production base of Quechen Silicon Chemical Co., Ltd., the largest precipitated silica producer in China, were completed and put into operation. The capacity of single production line is 60,000t/a. In March, 2013, the 70,000t/a LPS & HDS silica production lines of Anhui Quechen Silicon Chemical were formally put into production. As of the end of Sept. 2014, precipitated silica capacity of Wuxi Quechen totaled 250,000t/a.

Capacities of Precipitated Silica Producers in China (as of the end of Sept. 2014)



Source: ResearchInChina

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While domestic private companies are expanding capacities, foreign ones are also expanding their silica capacities in China. At the end of 2013, Solvay Silica elevated the capacity of Qingdao Plant from 72,000 tons/a to 112,000 tons/a. Solvay mainly produces precipitated silica with a capacity of 380,000 tons, accounting for about 10% of global amount, and has 8 silica production bases around the globe.

In Jul. 2014, Evonik Industries announced that it would establish silicon compound plants with Jiangsu Zhongneng Polysilicon Technology Development Co. Ltd. for the production of fumed silica and ultra-pure silicon tetrachloride. The plants will have an annual capacity of over 20,000 tons, and are scheduled to start-up operation in 2016. Evonik Industries is the world's largest silica producer with capacity of 550,000 tons, 15% of global total. Since the year 2014, the company has announced a series of plans for capacity expansion with the aim of raising its capacity in 2014 by 30% compared to 2010 levels.

From the perspective of demand, China's demand structure for precipitated silica has undergone some changes in recent years, with proportion of shoe making industry declining and that of tire rising. The improvement in tire demand proportion is largely due to the development of automobile industry, which spurs fast growth in demand for silica from tire, particularly green tire. In 2013, the downstream shoemaking industry made up 38% of total demand for silica (40% in 2011), and tire 20% (18% in 2011).

Global and China Silica Industry Report, 2014-2017 covers the following:

- Global silica market pattern, supply & demand;
- Policies, production structure, capacity, output, import & export and competitive landscape of China silica industry;
- Product segments in China silica industry, covering capacity, output and production structure of precipitated silica and fumed silica, capacities and key projects of major companies;
- Consumption structure and 6 main applications of silica in China;
- 6 global and 19 Chinese major precipitated silica and fumed silica producers.

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