



**Global and China Aramid Fiber 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

As a kind of new hi-tech synthetic fiber, aramid fiber chiefly falls into meta-aramid fiber and para-aramid fiber, in which para-aramid fiber is much higher than the other in technical difficulty and performance indicators.

1. Meta-aramid Fiber

In 2013, global meta-aramid fiber capacity totaled 42 kt, mostly distributed in the United States, Europe and Asia, 27.4% of which was swept by China.

Confronted with fierce competition in domestic market, some meta-aramid fiber products in China are exported overseas. In 2014, the output of meta-aramid fiber in China will hit 11 kt or so and net export volume of the product will be more than 800 tons, as it is predicted. Meta-aramid fiber in China is mainly applied in such fields as high temperature resistant filtration materials, safety protection, insulation paper, etc., among which high temperature resistant filtration materials accounted for over 50% of the total demand for meta-aramid fiber.

Companies that have realized meta-aramid fiber industrialization consist of Yantai Tayho Advanced Materials Co., Ltd., SRO Aramid (Jiangsu) Co., Ltd., Guangdong Charming Co., Ltd., etc., in which Yantai Tayho Advanced Materials Co., Ltd. wins the first place by production scale. It boasted a capacity of 7.6 kt of meta-aramid fiber as of the end of Sept. 2014; besides, its 1 kt/a meta-aramid fiber project is being constructed and is expected to be put into production in early 2015.

2. Para-aramid Fiber

In 2013, around 80 kt of para-aramid fiber was manufactured worldwide, involving major producers DuPont and Teijin Limited. Para-aramid fiber capacity of the aforementioned two giants approximated 80% of the world's total para-aramid fiber capacity. Para-aramid fiber industry in China developed late and progressively achieved industrialization in 2010. During 2010-2014, with multiple para-aramid fiber projects being put into production, para-aramid fiber output in China witnessed soaring growth and will hit about 1.3 kt in 2014 as it is predicted, lifting the country's self-sufficiency rate of para-aramid fiber market to over 50%.

In 2014, there are mainly 5 para-aramid fiber companies in China, such as Yantai Tayho Advanced Materials Co., Ltd., Suzhou Zhaoda Specially Fiber Technical Co., Ltd., China BlueStar Chengrand Research & Design Institute of Chemical Industry, etc., wherein, the above three companies each boasted a capacity of 1 kt/a. The para-aramid fiber production equipments are still immature in China; only Yantai Tayho Advanced Materials Co., Ltd. has relatively stable production lines, capable of annually producing 500 tons or so of para-aramid fiber. For the moment, China is characterized by plenty of proposed/ongoing para-aramid fiber capacities, including 15 kt/a para-aramid fiber project jointly invested and built by Shenzhen Selen Science & Technology Co., Ltd. and China BlueStar Chengrand Research & Design Institute of Chemical Industry.

Global and China Aramid Fiber Industry Report, 2014-2017 by ResearchInChina highlights the followings:

- Supply and demand, competitive landscape, etc. of meta-aramid fiber and para-aramid fiber market worldwide;
- Supply and demand, import & export, competitive landscape, development forecast (2014-2017), etc. of meta-aramid fiber market in China;
- Supply and demand, import & export, competitive landscape, development forecast (2014-2017), etc. of para-aramid fiber market in China;
- Demand from downstream aramid fiber application fields in China such as high temperature resistant filtration materials, protection domain, aramid fiber paper, optical cable-reinforced materials, tire cord, etc.;
- Operation, aramid fiber-related business, forecast and prospects, etc. of 14 aramid fiber and composite producers at home and abroad.



Source : Global and China Aramid Fiber Industry Report, 2014-2017 by ResearchInChina

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