



**Global and China Silica Industry
Report, 2015-2018**

Jan. 2016

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's silica (white carbon black) industry after rapid expansion over the preceding years has seen overcapacity and intensified competition among enterprises, combined with depressed demand from downstream sectors such as tire and shoemaking, China's silica capacity and output growth has been slow since 2013, with an around 50% capacity utilization of the industry. In 2015, the capacity and output rose 2.80% and 1.46% year on year to about 2,243 kilotons and 1,184 kilotons, respectively.

Against a slight downturn of the whole industry, Chinese silica enterprises are actively seeking breakthroughs by multiple means. Some companies are speeding up the R&D of high-performance silica technologies and launching projects; some competent players are beginning to get consciously involved in capital market and seeking a listing on the "New Three Board" (an over-the-counter market for growth enterprises); and a few ones are embracing business transformation.

Under the general trend of green tire development, the highly dispersible silica market in China has huge potential for development. Currently, Jiangxi Blackcat Carbon Black Inc., Ltd that is primarily focused on carbon black plans an 80 kt/a highly dispersible silica project in Jining, Shandong province, and Yuan Xiang Chemical Co., Ltd. plans to build a 100 kt/a green tire-dedicated highly dispersible silica production line in the next two to three years.

Moreover, foreign companies are also bullish on green tire's huge demand for silica. Solvay started its 80 kt/a highly dispersible silica project in Gunsan, S. Korea in April 2015, followed by an 85 kt/a highly dispersible silica project located in Poland in July, thus expanding the company's capacity to 465 kilotons. And Evonik Industries AG's highly dispersible silica project in Americana, Brazil is under construction, too.

There have been two major enterprises seeking a listing on the "New Three Board" since 2015, namely Wuxi Quechen Silicon Chemical Co., Ltd. and Yuan Xiang Chemical Co., Ltd. The former as the largest silica producer in China boasts a 250 kt/a capacity and was listed on the "New Three Board" in October 2015. The latter mainly produces silica used in silicone rubber, but also engages in the research and development of high performance silica in the fields of delustering agent and green tire; with a 20 kt/a capacity, it formally applied for "New Three Board" listing in December 2015. In addition, Tong Hua Shuang Long Chemical Industry Co., Ltd. as the first listed company with silica as its core business purchased Jilin Jinbao Pharmaceutical Co., Ltd. in October 2014 and then pharmaceutical business replaced silica to become the main engine for the company's performance.

Capacity of Precipitated Silica Production Enterprises in China by End-2015

No.	Company Name	Company Type	Capacity (ton)
1	Wuxi Quechen Silicon Chemical Co., Ltd.	Privately operated	250,000
2	Zhuzhou Xinglong New Material Co., Ltd.	Privately operated	130,000
3	Fujian Zhengsheng Inorganic Material Co.,Ltd	Privately operated	120,000
4	Solvay Silica (Qingdao) Co., Ltd.	Foreign-funded	112,000
5	Evonik Wellink Silica (Nanping) Co., Ltd.	Foreign-funded	100,000
6	Sanming Fengrun Chemical Co., Ltd.	Privately operated	95,000
7	Shandong Link Silica Co., Ltd.	Privately operated	80,000
8	Tong Hua Shuang Long Chemical Industry Co., Ltd.	Privately operated	66,000
9	Fujian Shaxian Jinsha Silica Manufacturing Co., Ltd.	Privately operated	65,000
10	Jiangxi Blackcat Carbon Black Inc., Ltd	Privately operated	60,000
11	LongXing Chemical Stock Co., Ltd.	Privately operated	35,000
12	Yuan Xiang Chemical Co., Ltd.	Privately operated	20,000
13	Shanxi Tond Chemical Co., Ltd.	Privately operated	15,000
14	Do-Fluoride Chemicals Co., Ltd.	Privately operated	9,000
Total			1,157,000

Source: ResearchInChina

The report mainly highlights the followings:

- Global silica market structure, supply and demand conditions;
- China's silica industry policies, production structure, capacity, output, import and export, competition pattern, etc.;
- Analysis on silica product segments in China, i.e. capacity, output, production structure, corporate capacity and projects of precipitated silica and fumed silica;
- China's silica consumption structure as well as six major applications;
- Analysis on 6 global and 20 Chinese precipitated / fumed silica manufacturers.

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