Global and China Aramid Fiber Industry Report, 2016-2020

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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.

Room 509, Building 1+1, No.10, Caihefang Road, Haidian District, Beijing, 100080
Phone: +86 10 82600828 ● Fax: +86 10 82601570 ● www.researchinchina.com ● report@researchinchina.com

Abstract

Aramid fiber is a kind of high-tech special fiber, and therefore has stable chemical properties and perfect mechanical properties, widely used in aerospace, IT (information technology), national defense, automobiles, and among other fields.

In 2015, the global aramid fiber capacity totaled 147 kilotons (up 2.5% year on year), some 70% of which came from the United States and Japan. In contrast, China accounted for a small portion of the total capacity, at less than 15%. In recent years, as breakthroughs are made in para-aramid fiber related technologies, China's aramid fiber capacity has grown rapidly, up 10.7% year on year to 21 kilotons (up 10.7% year on year)in 2015. In future, propelled by the rapid growth in downstream demand, the capacity will continue to increase. We expect that the capacity will reach 23 kilotons in 2016 and approach 35 kilotons in 2020.

The major global aramid fiber producers include DuPont, Teijin, Hyosung, Kolon, Huvis, Kamenskvolokno, Yantai Tayho Advanced Materials, X-FIPER New Material, and China BlueStar Chengr and Research & Design Institute of Chemical Industry, etc. Due to the industry's higher technical barrier, the market is mainly dominated by the international giants like Teijin and DuPont. Among them, DuPont has retained its leading position for years with a market share of around 50%, and Teijin over 20%.

At present, there are mainly three kinds of aramid fiber products on the market: aramid fiber1313, aramid fiber1414, and aramid fiber III.

Aramid fiber1313 is the first developed and most widely used aramid fiber product. In 2015, the capacity of aramid fiber1313 in China reached 16 kt/a, up 10.6% year on year, accounting for 75.4% of the total aramid fiber capacity. The Chinese producers are mainly Yantai Tayho Advanced Materials and X-FIPER New Material, both of which represented an aggregate market share of about 80% in 2015.

Aramid fiber1414 is a synthetic fiber with the highest strength and properties superior to aramid fiber1313. In 2015, China's aramid fiber1414 capacity came to 5.1 kt/a, making up 24.4% of the total aramid fiber capacity. At present, the Chinese companies suspended the production except Yantai Tayho Advanced Materialsand China BlueStar Chengrand Research & Design Institute of Chemical Industry, a situation that resulted from the fact that they had to import main raw materials, thus leading to higher prices of products. Even worse, the prices of imports have in recent years continued to decline, so that the weaker domestic players like Sinopec Yizheng Chemical Fibre Company Limited (YCF) and Shenzhen Selen Science & Technologyfailed tosecure benefits and chose to shut down.

Aramid fiberIII, one of lightweight, high-strength materials with best combined properties, has been widely used in national defense and military industry. Therefore, most countries regulate it as strategic materials, and related technologies are not allowed to be revealed or transferred. Currently, only China BlueStar Chengrand Research & Design Institute of Chemical Industry in China can mass produce aramid fiberIII, but with an annual capacity of less than 100 tons.

At present, the Chinese aramid fiber products, mostly the traditional aramid fiber1313, are mainly used in such fields as high temperature resistant filter materials and safety & protection. But aramid fiber1414 and aramid fiberIII have less application. With good performance, aramid fiber1414 and aramid fiberIIIare likely to be increasingly applied in automobiles, aviation, ships, and environmental protection in the future.

Global and China Aramid Fiber Industry Report, 2016-2020is primarily concerned with the following:

- Market size, market structure, competitive landscape of aramid fiber (including meta-aramid fiber and para-aramid fiber) worldwide;
- Supply and demand, competitive landscape, import & export of aramid fiber markets in China;
- Supply &demand, import & export, competitive landscape of meta-aramid fiber and para-aramid fiber markets in China;
- Aramid fiber application in downstream sectors including high temperature resistant filter materials, tire cord, aerospace materials, automotive materials, protection materials, aramid fiber paper, and marine materials;
- Operation, aramid fiber business, development in China of 5 global and 13 Chinese aramid fiber producers.

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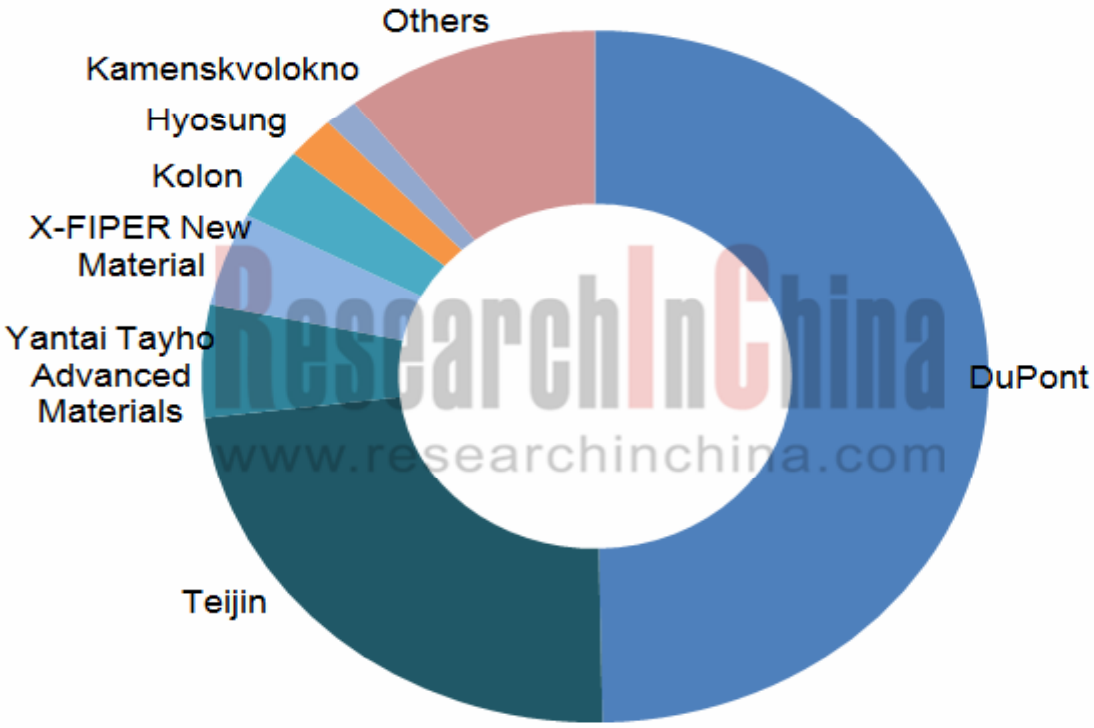
Competitive Landscape of Global Aramid Fiber Market, 2016



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