



**Global and China Aramid Fiber Industry  
Report, 2017-2021**

Sep. 2017

## **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

Global aramid fiber output totaled 115kt with capacity utilization of 76.0% in 2016. As industries like environmental protection and military develop, the output is expected to rise to 138kt and capacity utilization over 80.0% in 2021.

As one of the world's major aramid fiber producers, China produced about 14kt or 12.5% of the global total in 2016, up 8.3% from the previous year and representing a CAGR of 10.4% between 2011 and 2016. Stimulated by national policies, the aramid fiber market will maintain a growth rate of around 10.0% from 2017 to 2021. Due to technological limitations, China's capacity utilization is lower than the global average, standing at 62.1% in 2016. The figure will climb as the technology advances.

China produces mainly meta-aramid fiber with low technological requirements. In 2016, the country produced 13kt of meta-aramid fiber, making up 90.3% of the domestic market, far higher than the global average of 31.8%. By contrast, para-aramid fiber, particularly high-performance products, is largely imported with an import dependency of 36.3% in 2016.

Global aramid fiber market is highly concentrated with CR5 staying above 85% in 2016. Major enterprises include U.S. DuPont, Japanese Teijin, South Korean Kolon and Hyosung, and Chinese Yantai Tayho Advanced Materials and X-FIPER New Material. DuPont and Teijin are dominant in global aramid fiber market, holding a combined over 70% market share. Moreover, DuPont, Teijin and Yantai Tayho Advanced Materials are capable of producing both meta-aramid fiber and para-aramid fiber.

Because of its excellent performance (high-temperature resistance, lightweight, and long life cycle), aramid fiber is widely used in fields like high-temperature-resistant filter materials, automobile, and protection.

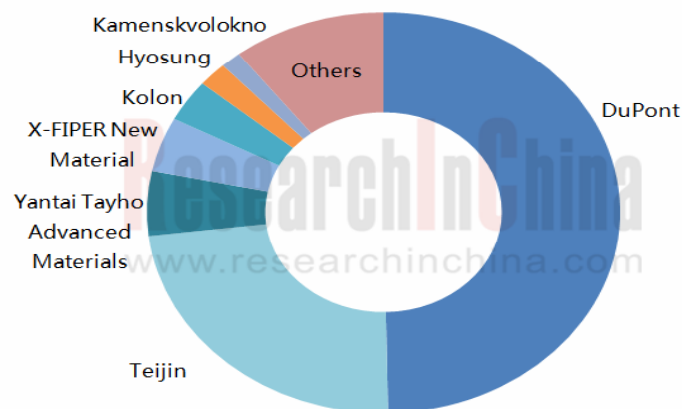
High-temperature-resistant filter materials: the Chinese high-temperature-resistant filter materials market presented a CAGR of over 30% between 2010 and 2016, and will maintain a growth rate of above 20% during 2017-2021 as the Chinese government focuses on tackling environmental pollution. Correspondingly, the demand for aramid fiber, one of main raw materials for high-temperature-resistant filter materials, will also move into high gear, expected to soar from 5.8kt in 2016 to 9.7kt in 2021.

Automobile: aramid fiber can be used to produce tire cord, brake pad, clutch, rectifier, engine shim, and car body. As it can greatly cut the weight of car body and reduce the resistance of tire, aramid fiber has become one of tire skeleton materials that grew at the fastest rate in recent years.

Global and China Aramid Fiber Industry Report, 2017-2021 focuses on the followings:

- ◆ Aramid fiber (overview, classification, development planning, industry chain, etc.);
- ◆ Global aramid fiber (meta-aramid fiber and para-aramid fiber) market;
- ◆ Chinese aramid fiber market (supply & demand, market structure, import & export, competitive landscape, problems, etc.);
- ◆ Chinese meta-aramid fiber market (market size, import & export, competitive landscape, problems, etc.);
- ◆ Chinese para-aramid fiber market (market size, import & export, competitive landscape, problems, etc.);
- ◆ Applications (high-temperature-resistant filter materials, tire cord, aerospace materials, automotive materials, protective materials, aramid paper, and optical cable reinforced materials) of aramid fiber (status quo of market and application);
- ◆ Five foreign and fourteen Chinese aramid fiber and composites producers (operation, aramid fiber-related business, etc.)

**Competitive Landscape of Global Aramid Fiber Market, 2016**



Source: Global and China Aramid Fiber Industry Report, 2017-2021

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