Global and China Refractories Industry Report, 2018-2022

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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.

Abstract

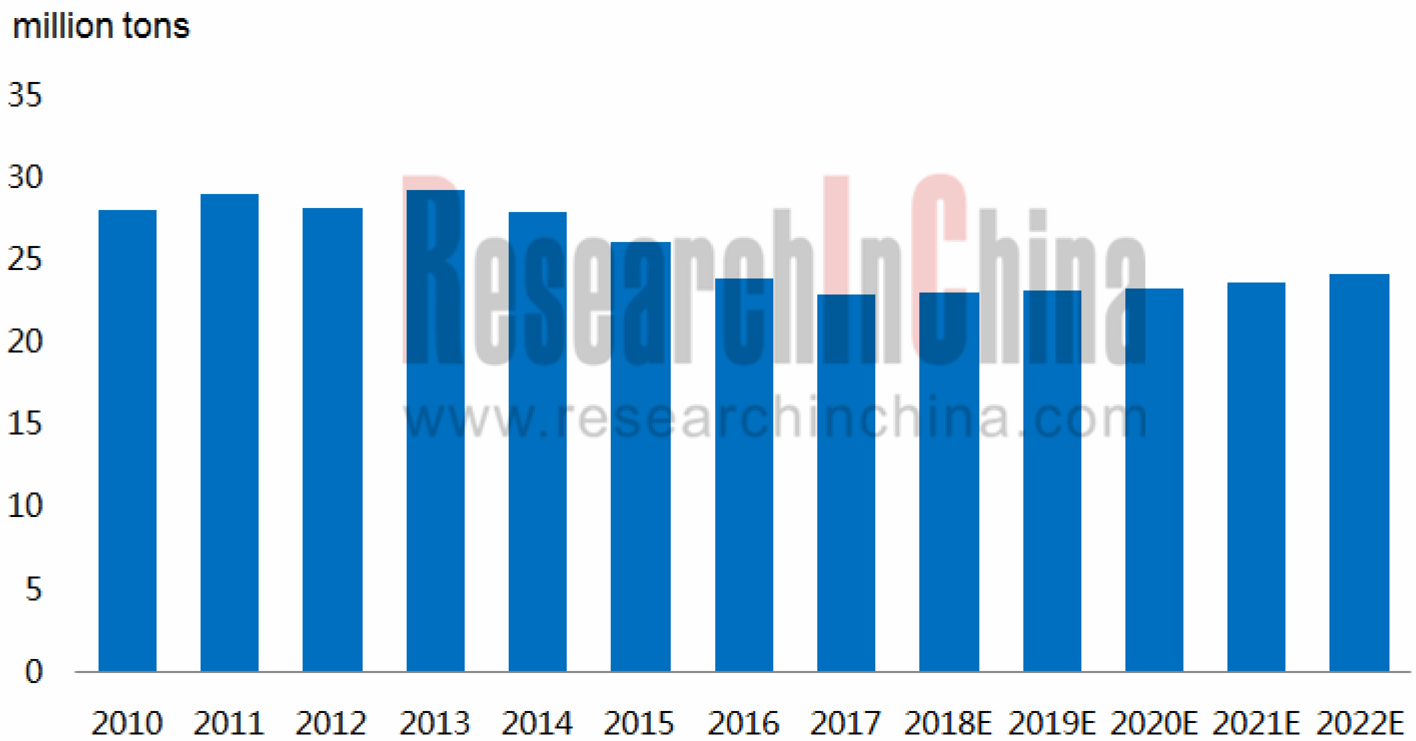
As the supply-side reform is carried out over the recent years, the demand for refractories used for infrastructure projects has dived and the output of refractories keeps falling. In 2017, China produced 22.9254 million tons of refractories, a year-on-year decrease of 4.3% (a drop of 4.43 percentage points on an annualized basis). The fall in output is because refractories for infrastructure construction was less needed since furnaces of some enterprises with substandard environmental work were forced to stop production whilst environmental protection campaign is being staged across China. The narrowed decline benefited from the recovery of downstream sectors like steel and building materials. It is expected that, in the next five years, the refractory market will witness moderate growth and the output of refractories will outnumber 24 million tons in 2022 in the wake of backward capacity being eliminated and the optimized structure of refractory industry.

As China tightens control on mineral resources and environmental pollution, the exploitation of raw materials such as magnesite was restricted in 2017 and the prices of magnesium refractory raw materials hiked. Thereupon, some suppliers of refractory raw materials and the refractory enterprises yielding proceeds from raw materials saw remarkable growth in profits, while refractory product enterprises are confronted with the amounting cost pressure and reap meager profits. Allured by the lucrative business, some enterprises in places like Liaoning province lifted their investments into high-purity magnesia projects in 2017.

In 2017, China's export value of refractory raw materials and products surpassed USD3.0 billion and reached USD3.076 billion, soaring by 19.90% from a year earlier. Yet, the average price of refractory product exports surged by 11.85% year on year, putting an end to the downward mobility for two successive years; and the average export price of refractory raw materials started to fall from 2012 and dropped by 11.64% year on year in 2017.

The world-renowned giants in refractory business are represented by RHI Magnesita, Vesuvius, Imerys, Krosaki-Harima and Shinagawa, among which RHI Magnesita is grown from the merger of RHI and Magesita in 2017 and currently the largest producer of refractories around the globe, with its sales reporting EUR1.946 billion. Thus far, those companies without exception have operations in China. In 2017, RHI Magnesita garnered the revenue of EUR121 million in China, and it has already restarted its Chizhou-based company's refractory material and mine production project in 2018.

Output of Refractories in China, 2010-2022E



Source: Global and China Refractories Industry Report, 2018-2022 by ResearchInChina

There are more than 2,000 refractory manufacturers each with annual revenue of RMB20 million in China, and the Chinese market is in perfect competition due to low entry barrier and in consequence with low concentration. The top 10 refractory enterprises' combined revenue occupied less than 20% of the total and the top 20 ones' swept 25% or so in 2017, according to the data of the Association of China Refractories Industry. In the future, three to five large Chinese refractory groups with international competitiveness will emerge through mergers and acquisitions, integration of industrial chains, etc.

The report highlights the followings:

◆

◆Demand and supply of refractories in global market and development in major countries;

◆Policy climate, trade policy and industrial environment for refractories in China;

◆Demand and supply and import & export of refractories in Chinese market, competition among enterprises, the development of refractories in key provinces, etc.;

◆Markets of refractory raw materials (magnesite, bauxite, graphite, silicon carbide);

◆Current development and major manufacturers of basic refractories, unshaped refractories, ceramic fiber, etc.;

◆Demand for refractories from downstream sectors like steel, cement and glass;

◆12 global and 20 Chinese refractory enterprises (operation, refractory business, etc.).

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Table of contents

1. Overview of Refractories
1.1 Definition & Classification
1.1.1 Definition
1.1.2 Classification
1.2 Industry Chain

2. Development of Refractories Worldwide
2.1Market Supply and Demand
2.1.1 Production
2.1.2 Demand
2.2 Major Countries/Regions
2.2.1 Europe
2.2.2 United States
2.2.3 Japan
2.3.4 India
2.3.5 Australia
2.3.6 Brazil
2.3.7 Russia
2.3 Key Companies

3 Environments for Refractory Development in China
3.1 Policy Climate
3.2 Trade Environment
3.2.1 Export Quota and Tariff Rate
3.2.2 The US' Anti-dumping Investigation on China-made Magnesia Carbon Bricks
3.3 Operation of Refractory Industry

4 Current Development of Refractories in China
4.1 Overview
4.2 Output & Structure
4.2.1 Output
4.2.2 by Product
4.2.3 by Region
4.3 Demand & Structure
4.3.1 Demand
4.3.2 By Application
4.3.3 By Product
4.4 Import & Export
4.4.1 Export
4.4.2 Import
4.5 Major Enterprises
4.5.1 Chinese Companies
4.5.2 Foreign Companies
4.6 Key Provinces
4.6.1 Henan
4.6.2 Liaoning
4.6.3 Shandong

5 Development of Main Refractory Raw Materials in China
5.1 Magnesite
5.1.1 Distribution of Resources
5.1.2 Magnesia
5.2 Bauxite
5.2.1 Distribution of Resources
5.2.2 Refractory Aluminum Clay

Table of contents

5.2.3 Brown Corundum and White Corundum
5.3 Graphite
5.3.1 Distribution of Resources and Market Demand and Supply
5.3.2 Magnesia Carbon Brick
5.4 Silicon Carbide

6 Development of Main Refractories in China
6.1 Basic Refractory
6.1.1 Development
6.1.2 Chrome-free Basic Refractory
6.1.3 Competitive Landscape
6.2 Unshaped Refractory
6.2.1 Development
6.2.2 Competition among Enterprises
6.3 Ceramic Fiber
6.3.1 Development
6.3.2 Key Companies
6.3.3 Development Prospects

7 Applied Markets of Refractories in China
7.1 Overview
7.2 Steel
7.2.1 Steel Market
7.2.2 Refractory for Steel
7.3 Glass
7.3.1 Glass Market
7.3.2 Refractory for Glass
7.4 Cement
7.4.1 Cement Market
7.4.2 Refractory for Cement

8 World-renowned Refractory Companies
8.1 RHI Magnesita
8.1.1 Profile
8.1.2 Operation
8.1.3 Progress in the Merger of RHI with Magnesita
8.1.4 Development in China
8.2 Vesuvius
8.2.1 Profile
8.2.2 Operation
8.2.3 Refractory Business
8.2.4 Development in China
8.3 Imerys
8.3.1 Profile
8.3.2 Operation
8.3.3 Refractory Business
8.3.4 Development in China
8.4 Krosaki Harima
8.4.1 Profile
8.4.2 Operation
8.4.3 Development in China
8.5 Shinagawa Refractories
8.5.1 Profile
8.5.2 Operation
8.5.3 Development in China
8.6 Magnezit

Table of contents

8.6.1 Profile
8.6.2 Operation
8.6.3 Development in China
8.7 Harbison Walker International (previously known as ANH Refractories)
8.7.1 Profile
8.7.2 Operation
8.7.3 Development in China
8.8 Morgan Advanced Materials (previously known as Morgan Crucible)
8.8.1 Profile
8.8.2 Operation
8.8.3 Development in China
8.9 Refratechnik
8.9.1 Profile
8.9.2 Operation
8.9.3 Development in China
8.10 Chosun Refractories)
8.10.1 Profile
8.10.2 Operation
8.10.3 Development in China
8.11 Minteq
8.11.1 Profile
8.11.2 Operation
8.11.3 Development in China
8.12 Saint-Gobain
8.12.1 Profile
8.12.2 Operation
8.12.3 Development in China

9 Key Enterprises in China
9.1 Puyang Refractories Group Co., Ltd.
9.1.1 Profile
9.1.2 Operation
9.1.3 Revenue Structure
9.1.4 Gross Margin
9.1.5 Customers and Suppliers
9.1.6 Development Strategy
9.2 Luyang Energy-Saving Materials Co., Ltd.
9.2.1 Profile
9.2.2 Operation
9.2.3 Revenue Structure
9.2.4 Gross Margin
9.2.5 Development Strategy
9.3 Ruitai Materials Technology Co., Ltd.
9.3.1 Profile
9.3.2 Operation
9.3.3 Revenue Structure
9.3.4 Gross Margin
9.3.5 Operation of Subsidiaries
9.3.6 Development Strategy
9.4 Beijing Lier High-temperature Materials Co., Ltd.
9.4.1 Profile
9.4.2 Operation
9.4.3 Revenue Structure
9.4.4 Gross Margin
9.4.5 Development Strategy

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Table of contents

9.5 Henan Rongjin High Temperature Materials Co., Ltd.
9.5.1 Profile
9.5.2 Operation
9.5.3 Revenue Structure
9.5.4 Major Customers
9.6 Liaoning Zhongmei Co., Ltd.
9.6.1 Profile
9.6.2 Operation
9.6.3 Major Customers and Suppliers
9.7 Zhejiang Zili Corporation Limited.
9.7.1 Profile
9.7.2 Operation
9.7.3 Zhejiang Zili Advanced Materials Co., Ltd.
9.8 Yingkou Qinghua Group Co., Ltd.
9.8.1 Profile
9.8.2 Operation
9.9 Wugang Refractory Co., Ltd.
9.9.1 Profile
9.9.2 Operation
9.9.3 Development Strategy
9.10 Yingkou Jinlong Refractories Group Co., Ltd.
9.10.1 Profile
9.10.2 Operation
9.11 Shandong Refractories Group Co., Ltd.
9.11.1 Profile
9.11.2 Operation
9.11.3 Main Subsidiaries
9.12 Tongda Refractory Technologies, Co. Ltd.
9.12.1 Profile
9.12.2 Operation
9.13 Sinosteel Refractory Co., Ltd.
9.13.1 Profile
9.13.2 Operation
9.14 Jiangsu Sujia Group Co., Ltd.
9.14.1 Profile
9.14.2 Operation
9.15 Haicheng Houying Trade Group Co., Ltd.
9.15.1 Profile
9.15.2 Operation
9.15.3 Key Projects
9.16 Others
9.16.1 Shanxi Xixiaoping Refractories Co., Ltd.
9.16.2 Zhengzhou Zhendong Technology Co., Ltd.
9.16.3 Shandong Luqiao New Materials Co., Ltd.
9.16.4 Sinosteel Luoyang Institute of Refractories Research Co., Ltd.
9.16.5 Haicheng Magnesite Refractory General Factory

10 Summary and Forecast
10.1 Market
10.2 Enterprises

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Selected Charts

- Classification of Refractories
- Refractory Industry Chain
- Refractory Consumption Structure by Sector
- Global Refractory Output, 2011-2022E
- Global Refractory Output Structure by Country/Region, 2017
- Global Demand for Refractories, 2009-2022E
- Production Structure of Refractories in Europe, 2013-2017
- Output of Refractories in Japan, 2013-2017
- Shipment of Refractories in Japan, 2013-2017
- Output of Refractories in Russia, 2010-2016
- Ranking of Major Refractory Suppliers Worldwide, 2017
- Policies on Refractories in China, 2012-2018
- Total Export Quota of Main Refractory Raw Materials in China, 2012-2018
- China’s Magnesia Export Tariffs, 2017
- Tentative Most-Favored-Nation Tariff Rate for Main Refractory Raw Materials, 2018
- China’s Average Export Price of Main Refractory Raw Materials, 2016-2017
- China’s Average Export Price of Refractory Products, 2011-2017
- Main Economic Indicators of Key Refractory Companies in China, 2014-2017
- List of Refractory Companies (1st Batch) with Production Lines Subject to Specifications for Refractories Industry
- Output and YoY Growth of Refractories in China, 2010-2022E
- Output of Refractories by Product in China, 2010-2017
- Output of Refractories and % of Total Output by Province/Municipality in China, 2017
- Demand for Refractories in China, 2013-2022E
- Demand for Refractories by Sector in China, 2017
- China’s Export Volume and Export Value of Refractories, 2011-2018

Selected Charts

- China’s Exports of Refractories by Product, 2009-2018
- China’s Import Volume and Import Value of Refractories, 2011-2018
- China’s Imports of Refractories by Product, 2011-2018
- Revenue Structure of TOP10 Refractory Material Companies in China, 2016-2017
- Presence of Major Global Refractory Companies in China, as of 2017
- Output of Refractories in Henan Province, 2012-2017
- Major Refractory Companies in Liaoning Province
- Output of Refractories in Liaoning Province, 2012-2017
- Newly-constructed High-purity Magnesia Projects in Liaoning Province, 2017
- Output of Refractories in Shandong Province, 2012-2017
- Classification of Refractory Raw Materials
- Distribution of Magnesite Reserves Worldwide (kt), 2017
- Distribution Chart of Magnesite Resources in China
- Output of Magnesite in Major Countries, 2016-2017
- Price Trend of Fused Magnesia in China, 2017
- Price Trend of Sintered Magnesia in China, 2017
- China’s Magnesia Output by Product, 2007-2017
- China’s Magnesia Exports by Product, 2007-2018
- Distribution of Bauxite Reserves Worldwide (kt), 2017
- Output of Bauxite in Major Countries (kt), 2016-2017
- Distribution of Bauxite in China
- China’s Bauxite Imports, 2007-2017
- China’s Bauxite Imports by Source Country, 2017
- China’s Refractory Aluminum Clay Exports, 2009-2018
- Price Trend of Bauxite Chamotte in China, 2017

Selected Charts

- China's Output of Brown Corundum and White Corundum, 2012-2017
- China's Exports of Brown Corundum and White Corundum, 2013-2018
- Price Trend of Brown Corundum and White Corundum in China, 2017
- Natural Graphite Output and Reserve Distribution Worldwide (kt), 2017
- China's Natural Flake Graphite Exports, 2009-2018
- Performance and Characteristics of Magnesia Carbon Bricks for Different Parts of Some Steel Plant's Converter
- China's Silicon Carbide Output, 2014-2017
- China's Silicon Carbide Factory Price Including Tax, 2016-2017
- China's Export Volume and Value of Silicon Carbide, 2013-2017
- Main Basic Refractory Raw Materials and Refractory Products
- Typical Applications of Basic Refractory
- Applications of Chromium-free Basic Refractory Bricks in Developed Countries
- Alternative Product/Technology Roadmaps for and Representative Producers of Chromium-free Basic Refractory Bricks
- Comparison between Unshaped Refractory and Shaped Refractory
- Proportion of Unshaped Refractory in Major Countries/Regions, 2017
- Unshaped Refractory Output Structure in China, 2010-2022E
- Major Unshaped Refractory Producers in China and Their Capacity, 2017
- Applications and % of Ceramic Fiber in China
- China's Ceramic Fiber Output, 2010-2022E
- Subsidiaries of the World's Leading Ceramic Fiber Producers in China, as of 2017
- Key Ceramic Fiber Enterprises in China and Their Capacity, 2017
- Substitution Advantages of Ceramic Fiber
- Consumption Sectors and Unit Consumption of Refractories
- Output of Main Refractory Material Downstream Industries in China, 2014-2017
- Global Crude Steel Output, 2010-2022E

Selected Charts

- TOP10 Crude Steel Countries by Output, 2017
- TOP50 Crude Steel Companies by Output, 2017
- Output and YoY Growth of Crude Steel in China, 2010-2022E
- Electric Furnace Steel Output Structure in China, 2013-2022E
- TOP10 Crude Steel Companies by Output in China, 2017
- Refractories for Steel
- Refractory Consumption per Ton of Steel in China, 2013-2022E
- Major Steel-use Refractory Companies in China and Their Clients, 2017
- New Demand for Refractories from Steel Industry, 2016-2020
- China's Plate Glass Output, 2012-2022E
- TOP8 Glass Companies by Output/Sales in China, 2017
- Distribution Chart of Refractories for Glass Melting Furnaces
- Structure of Refractories Applied in Glass Melting Furnaces
- Consumption of Fused Cast Aluminum Oxide for Various Glass Furnaces
- Key Companies of Fused Cast Refractories in China and Their Leading Products
- China's Cement Output, 2012-2022E
- Ranking of Top50 Cement Clinker Companies in China by Capacity, 2018
- List of Refractories for Different Parts of Cement Kilns
- RHI Magnesita's Operating Results, 2016-2017
- RHI Magnesita's Revenue by Sector, 2017
- RHI Magnesita's Revenue by Product, 2016-2017
- RHI Magnesita's Revenue by Region, 2016-2017
- Magnesita's Operating Results, 2016
- RHI Magnesita's Major Companies in China, as of 2017
- RHI Magnesita's Sales in China, 2010-2017

Selected Charts

- Vesuvius' Revenue and Profits, 2010-2017
- Vesuvius' Revenue and Profits by Business, 2010-2017
- Vesuvius' Global Presence, as of 2017
- Vesuvius' Revenue by Region, 2016-2017
- Vesuvius' Refractory Products
- Vesuvius' Revenue from Refractories, 2011-2017
- Vesuvius' Revenue from Refractories by Region and YoY Growth, 2013-2017
- Vesuvius' Refractory Companies in China
- Imerys' Global Operations
- Imerys' Major Events, 2010-2017
- Revenue and Net Income of Imerys, 2011-2018
- Revenue of Imerys (by Business), 2012-2018
- Imerys' Revenue from Four Major Businesses (by Product), 2015-2017
- Revenue of Imerys (by Region), 2012-2018
- Imerys' Monolithic Refractories (Calderys) Products and Application
- Imerys' Monolithic Refractories (Calderys) Production Bases and Competitors
- Calderys' Milestones in Development, 2005-2017
- Imerys' Subsidiaries in China
- Imerys' Revenue Structure by Region, 2017
- Krosaki's Development Course
- Revenue and Net Income of Krosaki, FY2009-FY2017
- Revenue (by Business) of Krosaki, FY2012-FY2017
- Applications and Percentage of Krosaki's Refractories, FY2017
- Revenue (by Region) of Krosaki, FY2012-FY2017
- Krosaki's Main Plants in China and Their Businesses

Selected Charts

- Shinagawa's Development Course
- Shinagawa's Main Products
- Selected Economic Indicators of Shinagawa, FY2012-FY2017
- Revenue (by Business) of Shinagawa, FY2012-FY2017
- Revenue (by Customer) of Shinagawa, FY2016
- Shinagawa's Global Operations
- Shinagawa's Overseas Sales, FY2009-FY2017
- Presence of Shinagawa's Companies in China
- Magnezit's Main Products and Services
- Magnezit's Global Operations
- Magnezit's Main Clients
- Harbison Walker International's Main Products
- Harbison Walker International's Main Plants and Their Products
- Morgan Advanced Materials' Main Products
- Revenue and Profits of Morgan Advanced Materials, 2009-2017
- Revenue of Morgan Advanced Materials (by Country/Region), 2016-2017
- Revenue and Profit Margin of Morgan Advanced Materials (by Business), FY2015-FY2017
- Revenue of Morgan Advanced Materials (by Applied Sector), FY2017
- Key Companies of Morgan Advanced Materials in China
- Refratechnik's Main Business
- Refratechnik's Global Network
- Refratechnik's Plants in China
- Chosun's Main Products
- Distribution of Chosun's Key Bases Worldwide
- Chosun's Main Financial Indicators, 2010-2015

Selected Charts

- Production Bases of Chosun in China
- Minteq's Main Refractory Products
- Revenue (by Business) of Minerals Technologies Inc., 2017
- Main Subsidiaries of Minteq
- Minteq's Revenue from Refractory Business, 2012-2017
- Revenue and Operating Income of Saint-Gobain, 2013-2018
- Key Operations of Saint-Gobain
- Application of Saint-Gobain's Refractories and Competitors
- Revenue of Saint-Gobain (by Business), 2013-2018
- Revenue of Saint-Gobain (by Region), 2013-2018
- Business Turnover of Saint-Gobain in China, 2008-2017
- Saint-Gobain's Refractory Companies in China
- Revenue and Net Income of Puyang Refractories Group, 2009-2018
- Puyang Refractories Group's Output and Sales by Product, 2016-2017
- Operating Revenue and YoY Growth (by Product) of Puyang Refractories Group, 2012-2017
- Operating Revenue (by Region) of Puyang Refractories Group, 2009-2017
- Puyang Refractories Group's Operating Revenue Structure by Application Sector, 2016-2017
- Puyang Refractories Group's Operating Revenue Structure by Sales Model, 2014-2017
- Gross Margin of Refractories of Puyang Refractories Group, 2009-2017
- Gross Margin of Main Products of Puyang Refractories Group, 2012-2017
- Puyang Refractories Group's Revenue from TOP5 Clients and % of Total Revenue, 2016-2017
- Puyang Refractories Group's Procurement from TOP5 Suppliers and % of Total Procurement, 2016-2017
- Puyang Refractories Group's Mergers and Acquisitions, 2009-2017
- Revenue and Net Income of Luyang Energy-saving Materials, 2009-2018
- Operating Revenue (by Product) of Luyang Energy-saving Materials, 2010-2017

Selected Charts

- Operating Revenue (by Region) of Luyang Energy-saving Materials, 2010-2017
- Consolidated Gross Margin of Luyang Energy-saving Materials, 2009-2018
- Gross Margin (by Product) of Luyang Energy-saving Materials, 2009-2017
- Business Development of Ruitai Materials Technology, 2008-2017
- Revenue and Net Income of Ruitai Materials Technology, 2009-2018
- Output and Sales Volume of Ruitai Materials Technology, 2011-2017
- Operating Revenue (by Product) of Ruitai Materials Technology, 2011-2017
- Operating Revenue (by Region) of Ruitai Materials Technology, 2009-2017
- Gross Margin of Refractories of Ruitai Materials Technology, 2008-2017
- Gross Margin (by Product) of Ruitai Materials Technology, 2011-2017
- Revenue and Net Income of Ruitai Materials Technology's Main Subsidiaries, 2017
- Energy-saving and Environment-friendly High-temperature Material Intelligent Manufacturing Base Project and High-temperature Material Innovation Center Project of Ruitai Materials Technology
- Business Development of Beijing Lier High-temperature Materials, 2011-2017
- Revenue and Net Income of Beijing Lier High-temperature Materials, 2009-2018
- Capacity and Capacity Utilization of Beijing Lier High-temperature Materials' Refractory Materials by Product, 2016-2017
- Output and Sales of Beijing Lier High-temperature Materials' Refractory Materials by Product, 2016-2017
- Operating Revenue (by Product) of Beijing Lier High-temperature Materials, 2012-2017
- Operating Revenue (by Region) of Beijing Lier High-temperature Materials, 2010-2017
- Gross Margin of Refractories of Beijing Lier High-temperature Materials, 2009-2017
- Gross Margin (by Product) of Beijing Lier High-temperature Materials, 2012-2017
- Main Products of Henan Rongjin High Temperature Materials
- Revenue, Net Income and Gross Margin of Henan Rongjin High Temperature Materials, 2012-2017
- Operating Revenue (by Product) of Henan Rongjin High Temperature Materials, 2013-2017
- Henan Rongjin High Temperature Materials' Revenue from TOP5 Clients and % of Total Revenue, 2017

Selected Charts

- Revenue and Net Income of Liaoning Zhongmei, 2014-2017
- Liaoning Zhongmei's Operating Revenue Structure by Business, 2016-2017
- Liaoning Zhongmei's Top 5 Clients and Top 5 Suppliers, 2017
- Revenue and Net Income of Zhejiang Zili Advanced Materials, 2014-2017
- Zhejiang Zili Advanced Materials' Operating Revenue Structure by Business, 2016-2017
- Main Products and Application of Yingkou Qinghua Group
- Refractory Output of Yingkou Qinghua Refractories, 2012-2017
- Refractory Output of Wugang Refractory, 2012-2017
- Yingkou Jinlong Refractories Group's Capacity by Product, 2017
- Yingkou Jinlong Refractories Group's Refractory Subsidiaries and Their Capacity of Main Products, 2017
- Refractory Output of Yingkou Jinlong Refractories Group, 2013-2017
- Refractory Output of Shandong Refractories Group, 2012-2017
- Capacity of Shandong Refractories Group's Main Subsidiaries/Branches
- Refractory Output of Tongda Refractory Technologies, 2012-2017
- Refractory Output of Sinosteel Refractory, 2012-2017
- Output of Jiangsu Sujia Group New Materials Co., Ltd., 2012-2017
- Main Refractory Products of Haicheng Houying Trade Group
- Refractory Output of Haicheng Houying Trade Group, 2012-2017
- Output of Shanxi Xixiaoping Refractories, 2012-2017
- Refractory Output of Zhengzhou Zhendong Technology, 2012-2017
- Refractory Output of Shandong Luqiao New Materials, 2012-2017
- Refractory Output of Sinosteel Luoyang Institute of Refractories Research, 2012-2017
- Capacity of Haicheng Magnesite Refractory General Factory by Product
- China's Refractory Output and Demand, 2017-2022E
- Output and YoY Growth of Major Refractory Companies in China, 2017

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