



Global and China Titanium Dioxide Industry Report, 2014-2017

Oct. 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

Since 2013, global and China titanium dioxide industry has been characteristic of the following:

Global titanium dioxide capacity growth suffered stagnation while new capacity was mainly concentrated in China: the titanium dioxide capacity worldwide in 2013 was 6.56 million tons, against the figure 6.55 million tons in 2012, while the new titanium dioxide capacity, which was mainly contributed by China, stood at 2.935 million tons in 2013, up 5.4% year on year, and accounting for approximately 45% of the world's total as opposed to 30% in 2010.

Thanks to economic recovery in Europe and America, the prosperity of titanium dioxide industry in China saw a pickup in 2014, which can be elaborated below:

1. Great surge in export volume: during 2012-2013, the export volume of titanium dioxide in China remained around 400 kt; while during Jan.-Aug. 2014, China exported 376 kt of titanium dioxide, soaring by 48.62% yr-on-yr.

2. Substantial growth in net income of major companies: in 2013, there were merely less than 20% titanium dioxide companies in the black, seeing meager profit; while from 2014, with the rally in titanium dioxide price and the recovery of overseas demand, titanium dioxide producers enjoyed distinct improvement in performance, in which Henan Billions Chemicals reported a year-on-year growth rate of as high as 636.62% .
3. Rise in titanium dioxide price: since 2014, large titanium dioxide manufacturers at home and abroad continuously have raised their quotations, and the titanium dioxide price in the Chinese market tends upwards. In Sept. 2014, Chinese titanium dioxide was averagely priced at RMB14,350/ton, slightly increasing by 5.21% in contrast with RMB13,640/ton in Aug.2014 and jumping by 12.11% compared with the figure in Jan. 2014.

Driven by the increasingly stricter environmental protection policies, the titanium dioxide industry in China will develop toward large scale and chlorination process. Over 98% of the titanium dioxide in China was produced via sulphate process. Access Conditions for Titanium Dioxide Industry (Revised) and Policy on Titanium Dioxide-oriented Industrial Pollution Prevention & Control Technology will be released in 2014 to promote industrial structure upgrading and industrial agglomeration, which would be conducive to the industrial development for a long time.

Global and China Titanium Dioxide Industry Report, 2014-2017, highlights the followings:

- Capacity, product structure, regional capacity structure, producers' capacity and competitive landscape of global titanium dioxide industry;
- Policy, capacity, output, consumption, import & export, price trend, industrial gross margin, etc. of titanium dioxide industry in China;
- Market structure, market pattern and profitability of major producers in China titanium dioxide industry;
- Upstream titanium dioxide raw material industry analysis from the perspective of titanium ore and sulfuric acid market, and cost analysis of titanium dioxide;
- Downstream application of titanium dioxide, involving demand structure and the demand from sectors such as paint, plastic, papermaking and denitration catalyst;
- Operation, output and sales volume of TiO₂, revenue structure, gross margin, major investment projects, etc. of 11 key Chinese titanium dioxide producer and 5 major titanium dioxide players in the world;
- Development prospect of China's titanium dioxide industry, covering forecast for capacity, output, import volume & export volume and total demand.

<i>Producer</i>	<i>2013</i>		<i>H1 2014</i>	
	<i>Net Income</i>	<i>YoY</i>	<i>Net Income</i>	<i>YoY</i>
<i>Henan Billions Chemicals</i>	23.6	-87.22%	11.6	636.62%
<i>CNNC Hua Yuan Titanium Dioxide</i>	16.4	-45.87%	12.2	258.71%
<i>Anhui Annada Titanium Industry</i>	-45.9	-309.27%	-17.1	22.51%

Source: Henan Billions Chemicals, CNNC Hua Yuan, Anhui Annada, ResearchInChina

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