

Survey of Titanium Dioxide in China The Ninth Edition January 2021

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1. Introduction

Survey of Titanium Dioxide in China, finished in January 2021, is CCM's ninth edition report on titanium dioxide industry. This intelligent report attaches importance to the following parts:

- ✓ Titanium dioxide production in China, 2017–2019
- ✓ Titanium dioxide and raw material prices in China, 2017 H1 2020
- ✓ Import and export analysis, 2017 2019
- ✓ Titanium dioxide consumption situation in China, 2017 2019

2. Approach for this report

The report is drafted by diverse methods as follows:

1) Desk research

The sources of desk research are various, including published magazines, journals, government statistics, industrial statistics, customs statistics, association seminars as well as information from the Internet. A lot of work has gone into compilation and analysis of the obtained information. Where necessary, checks have been made with Chinese suppliers regarding market information such as key producers, key end users, production, export and demand and so on.

2) Telephone interview

- Key producers
- Key end users
- Key traders
- Material suppliers
- Some associations
- Experts

Data compilation and crosscheck

The data from various sources have been combined and cross-checked to make this report as precise and scientific as possible.



3. Executive summary

Recent years, China's TiO_2 industry tended to develop steadily. The period of 2017–2019 saw consecutive growth of TiO_2 output in China, while fluctuation in the capacity. In 2017–2019, domestic TiO_2 capacity was XXX t/a, XXX t/a and XXX t/a respectively. The output increased from XXX tonnes to XXX tonnes, with a CAGR of XXX in 2017–2019. With the increasing concentration of the industry and manufacturers to obtain better production technology, it is estimated that TiO_2 's production capacity in China will exceed XXX million t/a by 2024 and the output will grow to about XXX million tonnes, at CAGR of about XXX and XXX respectively in 2020–2024.

So far, chloride process is at the nascent stage in China, while sulfate process still dominates. Although some major domestic manufacturers have already built or are building chloride process titanium dioxide projects, technical barriers, product quality and high cost of related facilities make the process unreachable to most producers. The upgrading of China's titanium dioxide production techniques still has a long way to go.

The domestic price curve of TiO_2 in 2017–2019 showed an "up-fluctuate-down" pattern, in which the price went up and peaked in mid-2017, fluctuated at a relatively high level until peaked again in early 2018, then followed by a downward trend till June 2020.

With high foreign demand and the continuous improvement in quality of domestic TiO_2 , TiO_2 exports continued to be strong in 2017–2019, while imports continued to decline. The export volume of China's TiO_2 increased from XXX tonnes to XXX tonnes, with a CAGR of XXX, while the import volume decreased from XXX tonnes to XXX tonnes.

As one of the largest consumers of titanium dioxide worldwide, China sees growing consumption of titanium dioxide. In 2017–2019, domestic TiO₂ consumption increased from XXX tonnes to XXX tonnes, with a CAGR of XXX. Coating, plastic and papermaking industries remain the largest downstream market for titanium dioxide, accounting for XXX, XXX and XXX of the total in 2019. It is expected that in the next five years, these three industries will continue to lead the way in titanium dioxide consumption.

4. What is in the report?

Note: Key data/information in this sample page is hidden, while in the report it is not.

1.1 Titanium dioxide production information, 2017–2019

The period of 2017–2019 saw consecutive growth of TiO2 output in China, while fluctuation in the capacity.

Figure 1.1-1 Capacity and output of titanium dioxide in China, 2017-2019



Source: CCM

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1.2 Top 40 titanium dioxide manufacturers, 2017–2019

In 2017, of all the domestic full-process TiO_2 manufacturers that maintained normal production, XXX manufacturers had their output exceeding XXX tonnes. Compared with the 2016 list, Shandong Jinhai Titanium Resources Technology Co., Ltd. was a new comer. The output of these XXX enterprises altogether reached over XXX million tonnes, accounting for about XXX of the national total. In particular, the output of Lomon Billions Group Co., Ltd. was XXX tonnes this year, accounting for over XXX of the total, far ahead of its peers.

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Table 1.2-2 Production information of the top 40 titanium dioxide manufacturers in China, 2019

			2019				
No.	Manufacturer	Location	Status	Capacity, t/a	Output, tonne	Note	
1	Lomon Billions Group Co., Ltd.	Henan	Active	xxx	XXX	Chloride process TiO ₂ capacity: XXX t/a	
2	CNNC Hua Yuan Titanium Dioxide Co., Ltd.	Gansu	Active	XXX	XXX	1	
3	xxx	XXX	XXX	XXX	XXX	/	
				XXX	XXX	1	
	Total			XXX	XXX	/	

Source: CCM

• • •

1.3 Titanium dioxide production distribution, 2019

Domestic TiO₂ manufacturers are mainly distributed in XXX provinces, municipalities and autonomous regions. In particular, many TiO₂ manufacturers congregated in Sichuan, Guangxi, Shandong and Jiangsu. The largest TiO₂ producer in China is headquartered in Henan Province, having production bases in both Sichuan and Hubei.

Table 1.3-1 Distribution of top 40 titanium dioxide manufacturers by province/municipality/autonomous region in China, 2019

Province/Municipality/Autonomous Region	Capacity, t/a	Company Number
Sichuan	XXX	XXX
Henan	XXX	XXX
Shandong	XXX	XXX
xxx	XXX	XXX
Total	xxx	XXX

Source: CCM

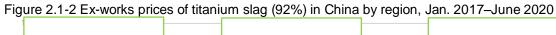
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2.1 Raw material price, 2017-H1 2020





Note: Ilmenite grading: 45%–47% in Yunnan Province, 40%–46% in Sichuan Province, 45%–54% in Hainan Province and 50%–52% in Guangxi Zhuang Autonomous Region





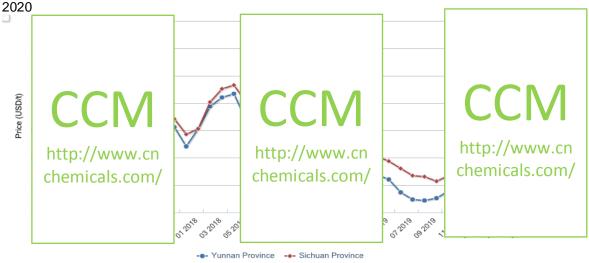
Source: CCM

Figure 2.1-3 Ex-works prices of titanium slag (90%) in China by region, Jan. 2017–June 2020



Source: CCM

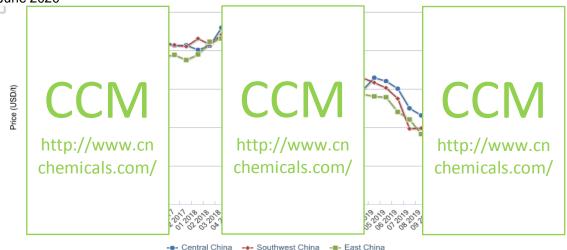
Figure 2.1-4 Ex-works prices of titanium slag (74%-76%) in China by region, Jan. 2017-June



2.2 TiO₂ price, 2017-H1 2020

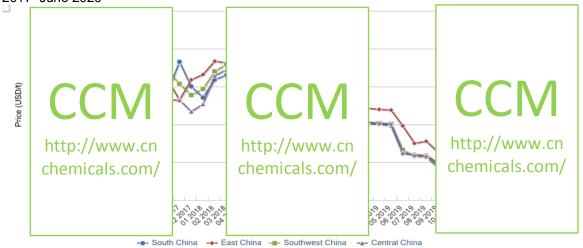
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Figure 2.2-1 Monthly ex-works prices of rutile titanium dioxide in China by region, Jan. 2017–June 2020



Source: CCM

Figure 2.2-2 Monthly ex-works prices of anatase titanium dioxide in China by region, Jan. 2017–June 2020



3 Mainstream titanium dioxide manufacturer, 2017-2019

3.1 Overview

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Table 3.1-1 List of domestic titanium dioxide producers with more than 100,000 tonnes output, 2019

No.	Producers	Note
1	Lomon Billions Group Co., Ltd.	xxx
2	CNNC Hua Yuan Titanium Dioxide Co., Ltd.	xxx
3	Pangang Group Vanadium & Titanium Resources Co., Ltd.	xxx
4	XXX	xxx
11	XXX	xxx

Source: CCM

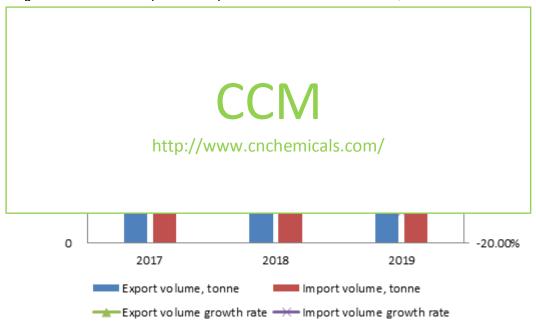
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5 Import and export analysis

5.1 Overview 2017-2019

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Figure 5.1-1 China's import and export volume of titanium dioxide, 2017–2019



Source: CCM & China Customs

...

Figure 5.1-2 China's import and export prices of titanium dioxide, 2017–2019



Source: CCM & China Customs

5.2 Import analysis 2017-2019

...

Figure 5.2-1 Import volume and price of titanium dioxide, Jan. 2017-Dec. 2019



Source: CCM & China Customs

5.3 Export analysis 2017-2019

...

Table 5.3-1 China's export destinations of titanium dioxide, 2017–2019

	Country	2017		2018		2019	
No.		Quantity, tonne	Price, USD/t	Quantity, tonne	Price, USD/t	Quantity, tonne	Price, USD/t
1	India	XXX	XXX	XXX	xxx	XXX	XXX
2	Brazil	xxx	XXX	XXX	xxx	XXX	XXX
3	South Korea	XXX	XXX	XXX	xxx	XXX	XXX
4		XXX	XXX	XXX	xxx	XXX	XXX
10	XXX	XXX	XXX	XXX	xxx	XXX	XXX
	Others	XXX	XXX	XXX	xxx	XXX	XXX
T	otal/Average	XXX	XXX	XXX	xxx	XXX	XXX

Source: CCM & China Customs

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6.1 Chinese titanium dioxide consumption situation

China, as an industrial power, is not only a producing powerhouse, but also a big consumer of TiO₂. In 2017–2019, domestic consumption volumes of titanium dioxide were XXX tonnes, XXX tonnes and XXX tonnes respectively, increasing with a CAGR of XXX.

Downstream application fields of TiO_2 are mainly coating, plastic, papermaking and chemical fiber, occupying the top four positions in China's TiO_2 consumption fields. In 2019, about XXX of China's TiO_2 was used in coating, followed by plastic and papermaking, accounting for XXX and XXX of the total respectively.

Figure 6.1-1 Consumption volume of titanium dioxide in China, 2017–2019



Table 6.1-1 Consumption volume of titanium dioxide by major end use segment in China, 2017-2019

Inductor	Consumption volume, tonne					
Industry	2017	2018	2019			
Coating	xxx	xxx	XXX			
Plastic	xxx	xxx	XXX			
XXX	xxx	xxx	XXX			
	xxx	xxx	XXX			
Others	xxx	xxx	XXX			
Total	xxx	xxx	xxx			

Source: CCM

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