

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

2.1 Summary of carbon black development in China

2.1.1 Historical development overview

Chinese carbon black industry was started since the 1950s, but...

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2.2.1 Overview of world carbon black industry and overseas manufacturers

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As of 2011, the capacity of carbon black is more than xxxxt/a in the world. The capacity of carbon black in 2011 has increased by xxxx compared with about xxxxt/a capacity in xxxx. Although global carbon black industry witnessed xxxx because of the xxxx during xxxx, it has xxxx since early 2010 thanks to the xxxx of xxxx industry (the main xxxx industry of carbon black). Thus, the whole trend of carbon black capacity and output in the world is xxxx at present.

In 2011, the main manufacturers of carbon black come from xxxx mostly (such as xxxx), but most of the production sites are not concentrated in xxxx but xxxx.

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In early 2011, there are xxxx key manufacturers in global carbon black industry. They are

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Table 2.2.1-1 Overseas main manufacturers, H1 2011

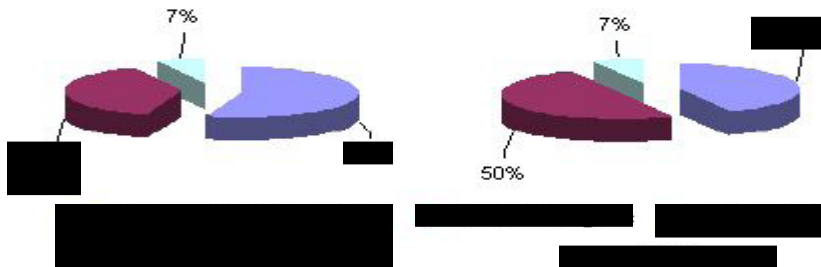
Company name	Abbr.	Capacity, t/a	Main method	Raw materials
Cabot Corporation	Cabot	xxxxxxxx	xxxxxxx	xxxxxxxxxxx
xxxxxxxx	xxxx	xxxxxxxx	xxxxxxx	xxxxxxxx
xxxxxxxx	xxxxx	1,360,000	xxxxxxx	xxxxxxxxxxx

Source: CCM International

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2.2.3 Industrial transfer trend

Figure 2.2.3-1 Global capacity of carbon black distribution proportion, 2004 and 2011



Source: CCM International

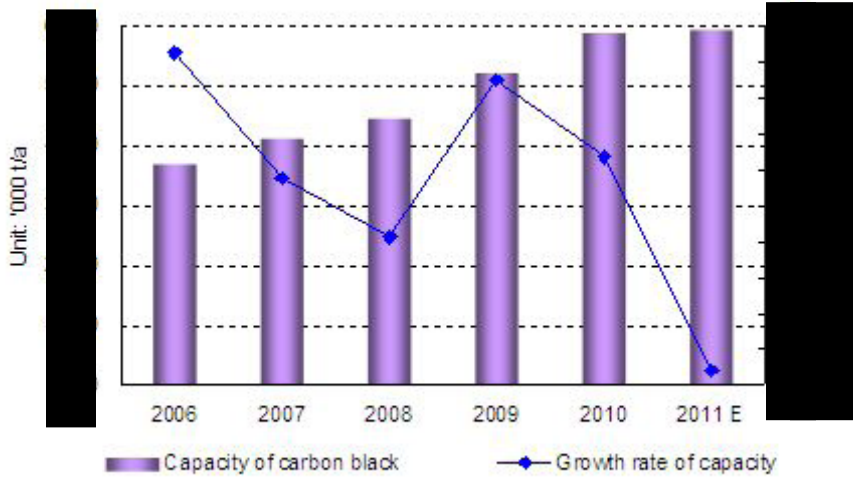
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2.3 Current situation of carbon black industry in China

2.3.1 Summary of production

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Figure 2.3.1.1-1 Capacity of carbon black in China, 2006-2011 E



Source: CCM International

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According to CCM International' s investigation, with strong demand from xxxx producers, the capacity of carbon black in xxxx also keeps xxxx, the new added carbon black capacity reaches about xxxx t/a, and the total carbon black capacity is xxxxt/a in 2011.

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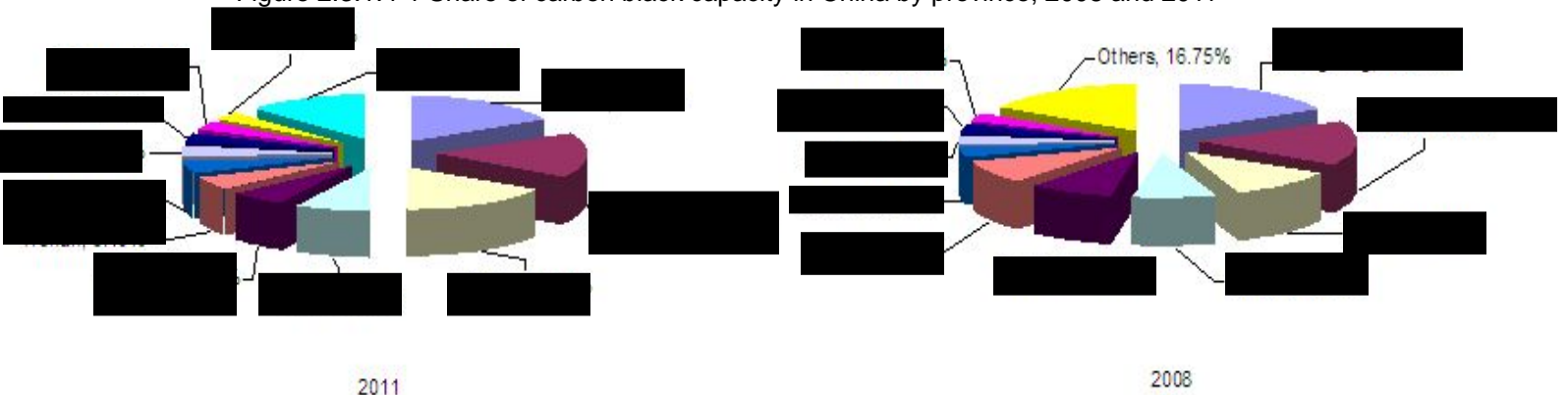
2.3.1.4 Distribution

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In 2011, the carbon black capacity is mainly located in xxxx Province, xxxx Province, xxxx Province, xxxx City and xxxx City in China, constituting xxxx%, xxxx%, xxxx%, xxxx% and xxxx% respectively of the total carbon black capacity in China. The carbon black capacity in these xxxx regions took up about xxxx% of the total carbon black capacity in 2011 in China.

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Figure 2.3.1.4-1 Share of carbon black capacity in China by province, 2008 and 2011



Source: CCM International

2.3.2.1 Annual capacity of key manufacturers

Table 2.3.2.1-1 Capacity of main carbon black manufacturers in China, 2010-2011E

No.	Company	Abbreviation	Location	Ownership	Capacity'2011 '000 t/a	Capacity'2010 '000 t/a
1	Jiangxi Black Cat Co., Ltd.	Jiangxi Black Cat	Jiangxi	xxxxxxx	xxxxxxx	xxxxxxx
2	xxxxxxx	xxxxxxx	xxxxxxx	Foreign-invested	xxxxxxx	xxxxxxx
3	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx
4	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx
5	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx
6	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx
7	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	140
8	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	120
9	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	120
10	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx
11	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx
12	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx
13	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx
14	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx
15	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	80
16	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx
17	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx
18	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx
19	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx
20	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx	xxxxxxx
21	xxxxxxx	/	/	/	2,345	2,550
Total					xxxxxxx	xxxxxxx

Source: CCM International

2.3.3 Expansion and new projects in the next five years

Table 2.3.3-1 New projects of carbon black in China, 2012-2016

No.	Project name	Location	Company	New capacity of carbon black, t/a	Status, 2011
1	xxxxxxxxxxxxx	xxxxxxxxxxxxx	xxxxxxxxxxxxx	xxxxxxxxxxxxx	xxxxxxxxxxxxx
2	xxxxxxxxxxxxx	Shanxi	xxxxxxxxxxxxx	xxxxxxxxxxxxx	xxxxxxxxxxxxx
3	xxxxxxxxxxxxx	xxxxxxxxxxxxx	xxxxxxxxxxxxx	xxxxxxxxxxxxx	xxxxxxxxxxxxx
4	xxxxxxxxxxxxx	xxxxxxxxxxxxx	xxxxxxxxxxxxx	xxxxxxxxxxxxx	xxxxxxxxxxxxx
5	xxxxxxxxxxxxx	xxxxxxxxxxxxx	xxxxxxxxxxxxx	xxxxxxxxxxxxx	xxxxxxxxxxxxx
6	xxxxxxxxxxxxx	xxxxxxxxxxxxx	xxxxxxxxxxxxx	xxxxxxxxxxxxx	xxxxxxxxxxxxx
7	xxxxxxxxxxxxx	xxxxxxxxxxxxx	xxxxxxxxxxxxx	xxxxxxxxxxxxx	Fund-raising stage, estimated to be finished in 2013.

Source: CCM International

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2.4 Current technology and future trends

2.4.1 Current carbon black technology assessment

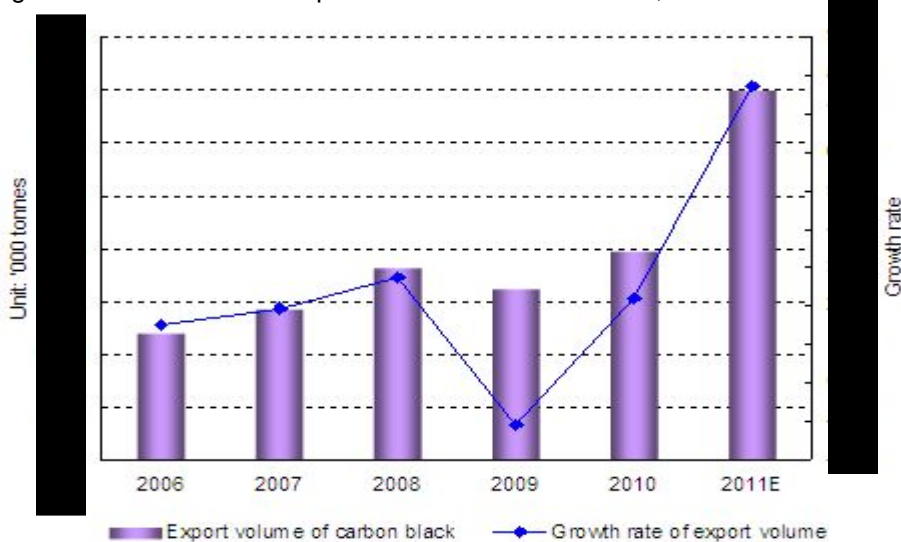
There is still a distance between Chinese and foreign carbon black production technology. The main problems for Chinese carbon black technology are:

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3.2.1 Export total volume and value changes between 2006 and 2011

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Figure 3.2.1-1 Volume of exported carbon black in China, 2006-2011 E



Source: CCM International

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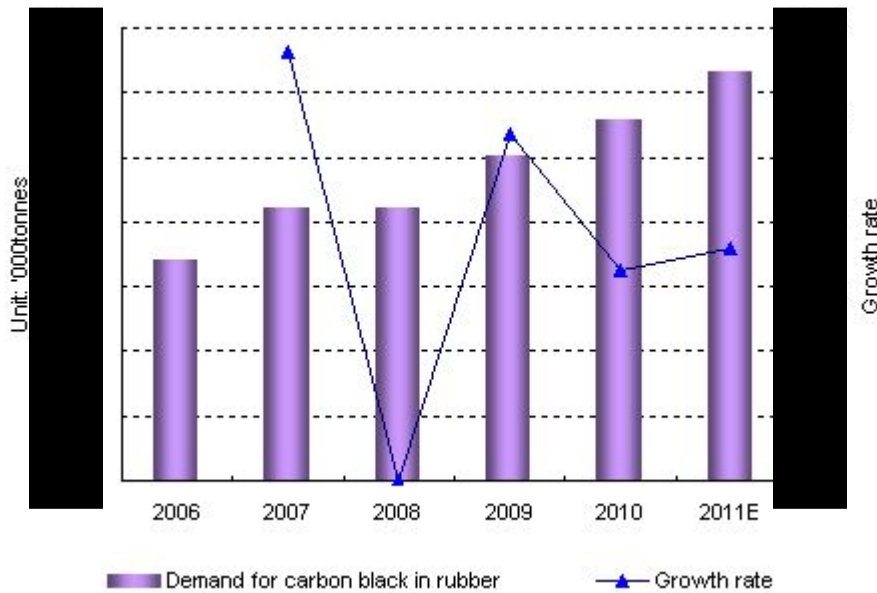
4 Consumption pattern of carbon black in China

4.1 Summary of carbon black consumption in China

Carbon black is an important industrial chemical, which is widely used in different industries, such as xxxx industry, xxxx industry, xxxx industry, xxxx industry and xxxx industry. Among those industries, the rubber industry enjoys xxxx in the total consumption volume of carbon black every year in China, accounting for about xxxx%.

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Figure 4.2.2-1 Carbon black demand in rubber industry in China, 2006-2011E



Source: CCM International