

## China BDO-PTMEG-Spandex Industry Chain Report, 2012-2015

**Description:** Concerning China's spandex industry from 2011 to the first half of 2012, on the one hand, capacity expansion continued; on the other hand, the demand from downstream sectors plunged into the doldrums, which caused a decrease in spandex price, as well as a substantial decline in business performance of major manufacturers. In 2011, spandex output of China approximated 260,000 tons, a year-on-year decrease of 4.6%; apparent consumption dropped by 1.7% YoY to 250,000 tons or so.

In 2011, China's spandex capacity reached 407,000 tons, accounting for more than 60% of the global total, which also made China the most significant spandex consumer market around the globe. In H1 2012, new spandex production capacity in China exceeded 40,000 tons, and it is expected to hit 470,000 tons for the whole year, then followed by a sharp reduction from 2013, whereupon the industry will step into the capacity digestion phase, accompanied by a possibly better supply-demand pattern.

As important upstream materials for spandex, PTMEG and pure MDI in 2011 kept high market prices as a whole, thus exerting greater cost pressure on spandex manufacturers. Downstream consumers of spandex refer to textile and garment, whose output growth plus with the ever-improving spandex utilization proportion owing to consumption upgrading constitute the leading causes to promote demand growth for spandex.

Spandex industry features a relatively high concentration degree in China, the key players include Zhejiang Huaфон Spandex Co., Ltd., South Korea's Hyosung, Zhuji Huahai Spandex Co., Ltd., United States-based INVISTA, Sichuan Youli Investment Holding Co., Ltd., Yantai Tayho Advanced Materials Co., Ltd., etc.. In 2011, spandex capacity of China spandex industry's top seven producers altogether occupied 65.2% of the national total. Moreover, leading companies are still expanding their spandex capacity, oriented by differentiated products.

In April 2012, Zhejiang Huaфон Spandex's 15,000 t/a High Temperature Thin Fabric Spandex Project was completed and put into operation, with total capacity up to 57,000 tons, thus surpassing Hyosung to again be China's largest spandex enterprise; the under-construction 7,000 tons/a Comfortable Spandex Project of Yantai Tayho Advanced Materials Co., Ltd., expected to go into operation at the end of 2012, will realize total capacity of 37,000 tons per year.

### KEY TOPICS COVERED

- Capacity, supply & demand, price trend, competitive landscape, import & export as well as development forecast of spandex industry in China;
- Capacity, supply & demand, import & export, price trend, etc. of upstream Industries of spandex in China such as PTMEG, MDI, BDO;
- Output, operation, import & export, etc. of downstream textile industry of spandex in China;
- Operation, spandex business, development forecast, etc. of 14 Chinese spandex producers.

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