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

1 Titanium dioxide production in China

1.1 Overview

After the rapid growth in the past few years, China has become the biggest titanium dioxide production country in 2009. And as of H1 2011, the titanium dioxide capacity has reached [redacted]t/a.

Meanwhile, the product structure in China has been much more reasonable than it was before. The capacity of rutile titanium dioxide is [redacted]t/a in 2011, accounting for about [redacted]% of the total capacity, while the figure was [redacted]t/a in 2006, about [redacted]% of the total.

Although the chloride process has progressed little in the past five years, it is likely to advance a little faster in the following [redacted] years, under the implementation of some sustainable policies, such as the Promotion Scheme for Clean Production in Titanium Dioxide Industry, published by the MIIT.

1.2 Current titanium dioxide production situation in China

1.2.1 Titanium dioxide production information in China

The production of titanium dioxide in China has accomplished a stable increase in the past [redacted] years. Though some medium or small plants suspended production or even shut down due to the global financial crisis, the situation gets much better in 2010. For example, Hubei Liming Chemical Co., Ltd., who suspended its production in the end of 2009 and restarted production in late 2010, is a witness. And the recovery is mostly attributed to the adoption of some supportive national policies of expanding domestic demand and the increasing downstream industries. The operating rates are [redacted]% and [redacted]%, respectively in 2010 and H1 2011, compared with [redacted]% in 2009.

1.2.2 Titanium dioxide manufacturers' information in China

There are [redacted] active titanium dioxide producers in China, among which Pangang Group Steel Vanadium & Titanium Co., Ltd. (PGVT) owns three manufacturers, Hunan Zhuzhou Chemical Industry Group Co., Ltd.-CNSIC and Yunnan Fuming Hutong Titanium Dioxide Co., Ltd. owns two manufacturers respectively, which means there are 66 active manufacturers in China at present, with the total capacity of [redacted]t/a.

Table 1.2.2-2 Capacity of top 30 titanium dioxide manufacturers in China, 2010-H1 2011, t/a

No.	Abbreviation	Capacity, 11'			Capacity, 10'		
		Anatase	Rutile	Non-pigment	Anatase	Rutile	Non-pigment
1	Shandong Dongjia	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
2	Lomon Titanium	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
3	Shandong Dawn	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
4	Jinan Yuxing	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
5	Henan Billions	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
6	Zhejiang Xinfu	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
7	Jiangsu Zhentai	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
8	Jiangxi Tianguang	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
9	Anhui Annada	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
10	Sichuan Dahutong	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
11	Sichuan Kangrui	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
12	Nanjing Titanium	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
13	Yunnan Zechang	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
14	Panyu Titanium	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
15	Dongfang Titanium	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
16	Taihai Titanium	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
17	Tianlun Titanium	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
18	Gansu Huayuan	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
19	Pangang Titanium	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
20	Sichuan Zhuoyue	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
21	Guangxi BlueStar	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
22	Guangxi Feidie	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
23	Yunnan Hutong	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
24	Wudi Seastar	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
25	Sichuan Dingxing	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
26	Hunan Yongli	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
27	Luohe Xingmao	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
28	Hongfeng Titanium	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
29	Hunan Current	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
30	Jinzhou Titanium	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
	Subtotal	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
	Others	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
	Total	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]

Source: CCM International

2 Consumption

2.1 Mass balance for Chinese titanium dioxide

In 2010, Chinese titanium dioxide is mainly consumed in coating, plastic and papermaking industries, with the consumption volume of [redacted] tonnes, [redacted] tonnes and [redacted] tonnes respectively. Meanwhile, titanium dioxide is also consumed in other fields, including welding rod, chemical fiber, rubber, ink and so on.

2.2 Market overview of Chinese titanium dioxide

Generally speaking, coating, plastics and papermaking are the major three consumption fields of titanium dioxide in China in the past five years. The consumption volume in these three fields increased from [redacted] tonnes in 2006 to [redacted] tonnes in 2010, with the CAGR of [redacted]%. And in H1 2011, the consumption volume in these three fields is [redacted] tonnes, accounting for about [redacted]% of the total.

Table 2.2-1 Consumption volume of titanium dioxide in major end use segments in China, 2006-2010, tonne

Year	Coating	Plastic	Papermaking	Others	Total
2006	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
2007	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
2008	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
2009	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
2010	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
CAGR	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]

Source: CCM International

2.3 Chinese titanium dioxide consumption situations

China is one of the largest consumers of titanium dioxide in the world. The apparent consumption volume of titanium dioxide in China accounts for about [redacted]% of the global consumption volume.

From 2006 to 2010, the apparent consumption of domestic titanium dioxide increased from [redacted] tonnes to [redacted] tonnes, with the CAGR of [redacted]%, and the apparent consumption goes to [redacted] tonnes in H1 2010.

2.3.1 Coating

In China, coating is the largest consumption field of titanium dioxide, with about [redacted]% of the total used in the industry in H1 2011, reaching about [redacted] tonnes.

From 2006 to 2010, the consumption volume in the coating industry increased from [redacted] tonnes to [redacted] tonnes, with the CAGR of [redacted]%.There are three major categories of coating using titanium dioxide, which are architectural coating, industry coating and specialty coating.

Table 2.3.1-1 Some end-users of titanium dioxide in the coating industry in China, 2011

No.	Company name	Titaniun dioxide demand volume, tonne	Type	Origin
1	Nippon Coating (Chengdu) Co., Ltd.	[redacted]	Rutile	Imported, domestic
2	Carpoly Chemical Group Co., Ltd.	[redacted]	Rutile, anatase	Imported, domestic
3	Jotun Coating (Zhangjiagang) Co., Ltd.	[redacted]	Rutile	Imported
4	Akzonobel Changcheng Coating (Guangdong) Co., Ltd.	[redacted]	Rutile, anatase	Imported, domestic
5	BASF (Shanghai) Coating Co., Ltd. Guilin Exterior Wall Coating Co., Ltd.	[redacted]	Rutile	Imported
6	Shanghai Jizhong High Polymer Co., Ltd.	[redacted]	Rutile	Domestic

Source: CCM International