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2024 China (Shanghai) International Titanium Dioxide Exhibition

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Titanium dioxide industry to explore the development of the "14th Five-Year Plan"

Break through the chlorination process and optimize the product structure to enter the international market

"During the '14th Five-Year Plan' period, the titanium dioxide industry should accelerate its transition from a traditional industry to an advanced manufacturing industry, and optimize the product structure of chlorination and sulfuric acid processes. In addition, with the wave of domestic titanium dioxide reconstruction and expansion, supply may exceed demand, It has become a must for domestic titanium dioxide to go to the international market." On March 29, at the 2021 sulfur industry chain market exchange meeting held by the China Sulfuric Acid Industry Association in Beijing, Fu Yijiang, deputy secretary-general of the Titanium Dioxide Branch of the China Coatings Industry Association made the above statement judge.

Coexistence of Two Processes Product Structure Optimization

The "14th Five-Year Plan" titanium dioxide industry plan mentioned that it is necessary to actively promote industrial upgrading, optimize the product structure of chlorination and sulfuric acid; increase investment in scientific research and technological transformation, and continue to improve the overall competitiveness of the product market; The level of resource utilization of by-products; expand international cooperation and exchanges, and enhance the ability to resist risks in the development process of the industry.

Among them, optimizing the product structure of the chlorination method and the sulfuric acid method is a matter of particular concern to the current industry. As early as 2007, titanium dioxide by sulfuric acid process was included in the ranks of high energy consumption and high pollution. Not only that, but the catalog for guiding industrial structure adjustment also clearly listed titanium dioxide by sulfuric acid process as a restricted industry. At the same time, the encouragement of imported technology and product catalogs also mentions the need to vigorously develop chlorination titanium dioxide. However, in the face of the fact that the current chloride titanium dioxide technology is not mature enough and sulfuric acid titanium dioxide still occupies a dominant position, industry insiders are more worried about whether the market for sulfuric acid titanium dioxide will be restricted.

In this regard, Fu Yijiang said: "Although sulfuric acid titanium dioxide has been included in the restricted list, from the analysis of the current situation, it is expected that during the '14th Five-Year' or even the '15th Five-Year' period, sulfuric acid titanium dioxide will not it will be eliminated immediately. The country's mineral resources and the construction of new and expanded equipment determine that sulfuric acid titanium dioxide is still the mainstream. Therefore, under the current circumstances, sulfuric acid titanium dioxide and chloride titanium dioxide will still coexist. But In the future, the industry should pay attention to the research and development of chlorination titanium dioxide process, and strive to make chlorination titanium dioxide a strong point."

The sulfuric acid method finds the crux and the chlorination method seeks a breakthrough

Titanium dioxide by sulfuric acid method and titanium dioxide by chloride method will coexist for a long time, but how should they develop in the later stage? Fu Yijiang pointed out that during the "14th Five-Year Plan" period, the industry must find the crux of the sulfuric acid

titanium dioxide and make improvements so that it can better develop green factories and green products. In terms of chlorinated titanium dioxide, it is necessary to make breakthroughs, promote the structural reform of the supply side of the industry, promote the healthy development of my country's titanium industry chain, and effectively improve the technological and industrial innovation capabilities of my country's titanium dioxide industry. Fu Yijiang said: "The current disadvantages of sulfuric acid titanium dioxide and the crux of the impact on industrial development are mainly manifested in the following five aspects: First, the intermittent production mode of the process, with a low degree of automation; labor-intensive production mode, low labor productivity. Secondly, the degree of informatization is low, and the management method is relatively backward. Thirdly, the process management of material and energy is extensive, and the resource consumption and energy consumption of titanium dioxide are high. Fourthly, the level of clean production is low, and the discharge of "three wastes" is large. Fifthly, titanium There is a gap in the quality, performance and application requirements of white powder products, and the industry's technological development capabilities are insufficient."

In this regard, Fu Yijiang believes that the industry should reengineer the process of each link of sulfuric acid titanium dioxide, so as to realize the continuous production of each main process and provide a basis for automatic control of the process. For example, carry out continuous production and automatic production transformation on the main process of titanium dioxide; carry out continuous automatic production transformation on each operation unit; carry out control system transformation on equipment, adopt integrated control and information management technology; carry out automatic transformation on production workshop and titanium dioxide production Linkage control management; automatic production transformation of environmental protection devices, continuous monitoring of waste water and waste gas emissions, etc.

Fu Yijiang especially emphasized that in order to promote industrial upgrading and make the industry reach the level of advanced manufacturing in an all-round way, it is necessary to introduce and use advanced technology and equipment to provide a basis for the implementation of DCS. At the same time, the development of automatic control of titanium dioxide production can not only improve production capacity and level, but also realize intelligence and improve production efficiency. Combined with ERP, management and operation efficiency can be improved.

New production capacity is difficult to digest and going international is inevitable

Fu Yijiang also introduced the status quo of my country's titanium dioxide industry. During the "13th Five-Year Plan" period, the concentration of my country's titanium dioxide industry has increased, and there are 40 full-process manufacturers above the scale with normal production conditions. Among them, there is 1 super-large enterprise with an effective production capacity of 1 million tons/year or more; 11 large-scale enterprises with a production capacity of 100,000 tons/year and above; 10 medium-sized enterprises with a production capacity of 50,000 to 80,000 tons/year; the rest The 19 manufacturers are small and micro enterprises.

After more than 10 years of hard work, the current production technology of titanium dioxide by chloride method has made a breakthrough. In 2020, the production capacity will reach 600,000 tons, and the output will reach 330,000 tons, accounting for 10% of the total output of titanium dioxide in the country.

From the perspective of the titanium dioxide market, the demand for consumer goods and real estate-related commodities at home and abroad will greatly stimulate the increase in China's titanium dioxide production. Titanium dioxide is a product that is just in demand in many fields. Judging from the current global market, titanium dioxide will still be in the stage of "supply exceeds demand" in the short term.

However, Fu Yijiang pointed out that the new wave of reconstruction and expansion may have a certain impact on the industry. According to incomplete statistics, domestic titanium dioxide projects under construction, construction preparation and expansion will add 1.96 million tons/year of new production capacity, of which more than 400,000 tons/year will be produced by the chlorination method. Such a large new production capacity is difficult to digest in terms of the current domestic market. Once the actual production capacity is formed, it will quickly break the balance of supply and demand in the domestic market. In the future, it will become a must for China's titanium dioxide to go to the world.



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