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China's Titanium Dioxide Industry Faces Challenges in 2025 with Production Capacity Approaching 7 Million Tons

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In 2024, China's titanium dioxide market was marked by a tug-of-war between supply-demand dynamics and production costs, resulting in a price trend that rose initially before declining later in the year. Despite fluctuations, prices generally exhibited a weak and volatile trajectory. Research data indicates that rutile titanium dioxide prices ranged between 13,800 RMB/ton at the lowest and 17,000 RMB/ton at the peak, with an annual average of 15,495 RMB/ton—a slight 1.28% decrease from 2023's average of 15,697 RMB/ton.

Record-Breaking Exports Amid Tariff Pressures

This year, China's titanium dioxide exports faced significant challenges, as high anti-dumping tariffs were imposed by regions such as the European Union, Brazil, and others. To date, five economies or countries, including the Eurasian Economic Union, the EU, Brazil, India, and Saudi Arabia, have initiated anti-dumping measures against Chinese titanium dioxide.

Despite these headwinds, China's export volume reached a new record. According to Chinese customs data, from January November 2024, China exported a total of 1.7433 million tons of titanium dioxide, representing a year-on-year increase of 16.35% or 245,000 tons. This surpassed the 2023 full-year export volume of 1.6417 million tons.



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Growing Capacity Amid Weak Domestic Demand

With the commissioning of new production facilities, China's titanium dioxide supply growth has accelerated significantly. However, downstream demand remains subdued due to the sluggish real estate sector, exacerbating domestic supply-demand imbalances.



As of the end of 2024, China's total titanium dioxide production capacity reached 6.05 million tons, a 16.5% year-on-year increase compared to 2023. The capacity expansion was primarily concentrated in regions like Inner Mongolia, Guangxi, and Sichuan. Simultaneously, annual production is estimated to reach 4.5–4.6 million tons.

Rising Costs and Demand Pressures

In addition to increased supply, the industry has been grappling with higher raw material costs, which have significantly compressed profit margins for producers. On the demand side, declining growth in China's real estate development investments has resulted in lower operating rates in the downstream paint and coatings industries, leading to persistently weak demand. This has placed further downward pressure on titanium dioxide prices, contributing to an overall declining market trend throughout the year.

Outlook for 2025

Unconfirmed reports indicate that at least five new titanium dioxide projects are set to begin operations in 2025, with an expected additional capacity of 1.3 million tons. If realized, this would push China's total titanium dioxide capacity beyond 7 million tons per year.

Looking ahead, China's titanium dioxide market is likely to face dual challenges of increasing capacity and slowing demand. These pressures are expected to intensify competition among industry players, potentially reshaping the competitive

landscape.

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