China Activated Carbon Industry Report, 2011-2012

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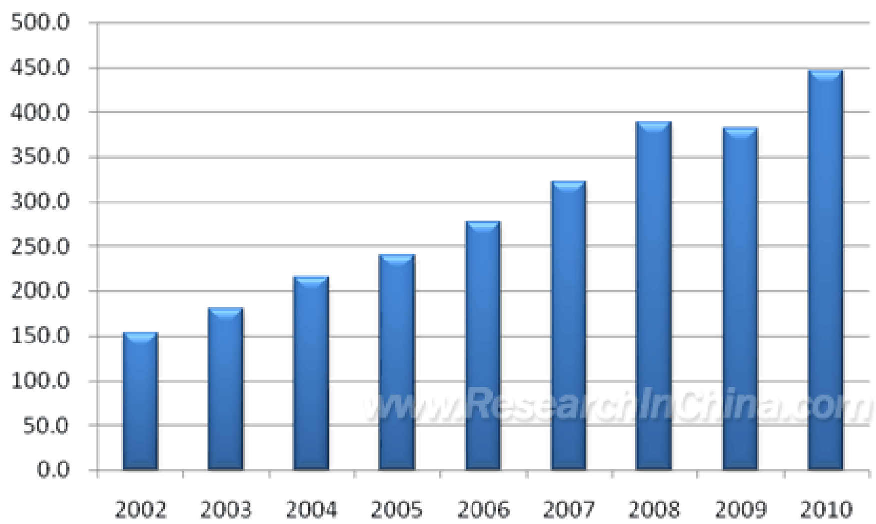
Abstract

Starting the industrial production of activated carbon in 1950s, China now has become the world's largest activated carbon producer and exporter. In recent years, China's activated carbon output has seen rapid growth. From 2002 to 2010, the average annual growth rate of the output was 14.4%; particularly, the output reached 445,000 tons in 2010, up 16.7% from 2009.

China's Activated Carbon Output, 2002-2010 (Unit: kt)



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Currently, about 50% of Chinese activated carbon is exported to countries and regions including Japan, the United States, and Europe, usually as semi-finished carbon products that need to be re-processed. In 2010, China exported 221,000 tons of activated carbon (up 12.9% year on year), accounting for 49.7% of the total domestic output. The activated carbon imported by China is mainly high value-added activated carbon with special purposes. From 2008 to 2010, China imported over 12,000 tons annually.

By raw material, activated carbon is mainly divided into coal-based activated carbon and wood-based activated carbon, which accounted for 69.9% and 29.9% of the total output of activated carbon respectively in 2010. Owing to the activated carbon raw material supply constraints, manufacturers mainly set plants in the regions where there are abundant raw materials, and the industrial layout is relatively concentrated.

Coal-based activated carbon enterprises are mainly concentrated in Shanxi, Ningxia and other coal-rich regions. The annual activated carbon capacity of Ningxia Huahui and Shenhua Ningxia Coal Industry Group reached more than 50,000 tons in 2010 respectively. In recent years, other coal giants have also entered the field of coal-based activated carbon, for example, Datong Coal Mine Group will build up a capacity of 100kt/a coal-based activated carbon in 2012.

Wood-based activated carbon companies are mainly located in Fujian, Jiangxi, Zhejiang and Jiangsu, but they are mostly small enterprises that produce less than 10,000 tons a year each. In this field, only Fujian Yuanli and Zhixing can each produce more than 20,000 tons of activated carbon a year. In 2010, Fujian Yuanli held approximately 17% market share (by output) in the field of wood-based activated carbon in China. With the acquisition of Jiangxi Huaiyushan Suntar and the operation of new projects, the capacity of Fujian Yuanli will reach 40,000 tons in 2012.

This report includes the following aspects:

--Development of global activated carbon industry, including demand, industrial layout, main consumption areas and development trends;

--Demand for Chinese activated carbon in the world's major areas, including the United States, Europe, Japan, South Korea and emerging markets such as Latin America and Africa;

--Development of China activated carbon industry, including supply and demand, industrial layout, import and export, upstream and downstream industries;

--Domestic demand for activated carbon from industries including water treatment industry, food and beverage industry, chemical and metallurgical industry, pharmaceutical industry, automotive industry, and oil and gas recovery industry;

--Production, operation, development, acquisition, performance prediction of 6 major coal-based activated carbon companies and 6 major wood-based activated carbon companies in China.

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