



Global and China Isostatic Graphite Industry Report, 2012

Sept. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include EPIA, National Bureau of Statistics of China and China Customs etc.

Abstract

As a kind of core and essential raw material with high tech content, isostatic graphite is widely used in industries like PV, electrical discharge machining, optical fiber manufacturing and new-type nuclear power. After 2006, the boom of PV industry across the world broke the supply-demand balance of the isostatic graphite market, accelerating the strain of market supply. Against the backdrop, isostatic graphite giants in America, Japan and Europe invested heavily to expand capacity in the aim of cushioning the strain. In 2011, the worldwide supply gap of isostatic graphite was no more than 1,500 tons. It is estimated that the market will pick up the supply-demand balance in 2012. In this round of expansion of isostatic graphite capacity, China has become a popular investment destination as well as the most important consumer market.

As a global leader in manufacturing industry and the largest PV products producer, China has long been the huge demander for isostatic graphite. With China's skyrocketing development of PV industry in recent years, the demand for isostatic graphite is increasing year by year. However, either the output or the quality of isostatic graphite of China failed to get improved efficiently due to laggard manufacturing technologies, on top of technology lock-in by the foreign counterparts. In 2011, China's demand for isostatic graphite hit 18,000 tons, while the output was no more than 9,500 tons, with the supply gap reaching 8,500 tons. At present, most Chinese enterprises recently tapping into isostatic graphite business have encountered difficulties such as insufficient technological reserves and unreasonable product mix which are hard to be resolved in the short term. The estimation shows that the supply of high-end isostatic graphite with demanding specification, fine structure in China will remain tight in the coming years.

Demand for Isostatic Graphite in China, 2006-2012 (ton)



Source: ResearchInChina < Global and China Isostatic Graphite Industry Report, 2012 >

The report touches on the development of global and China isostatic graphite industry and highlights isostatic graphite business of 8 foreign enterprises, including POCO, GrafTech, Mersen, TOYO TANSO, SGL, Tokai Carbon, IBIDEN and NTC, as well as 10 domestic enterprises including Fangda Carbon New Material, Shida Carbon and Sinosteel Shanghai Advanced Graphite Material.

TOYO TANSO boasts the world's largest isostatic graphite manufacturer, with the capacity in 2011 hitting 11,000 tons. Its products cover major downstream sectors. Currently, the company's 4,000-ton isostatic graphite production line is under construction. After it being put into production, the isostatic graphite capacity of the company is expected to total 15,000 tons.

Stemming from France-based LCL, Mersen is the first foreign isostatic graphite producer that established production base in China, with the capacity in 2011 registering 10,000 tons. By 2012 when its capacity expansion project in Chongqing base will be finished, the total isostatic graphite capacity of the company will report 11,000 t/a.

SGL is a transnational carbon product company, with isostatic graphite production bases located in Yangquan of Shanxi Province and Bonn in Germany. In July 2010, the company announced to invest EUR75 million to increase the isostatic graphite capacity from 5,000 t/a to 15,000 t/a. And the project is under construction.

Fangda Carbon New Material has become the only domestic isostatic graphite producer with sophisticated technology in the wake of its acquisition of Chengdu Carbon. In 2012, the isostatic graphite capacity of the company attained 4,000 t/a. Thus far, its 30,000 t/a special graphite project got approval at the general meeting of shareholders. And the isostatic graphite capacity of the company is expected to record 24,000 t/a in the long run.

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