China Coal Tar Industry Report, 2012-2015

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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 Company Reports, and National Bureau of Statistics of China etc.

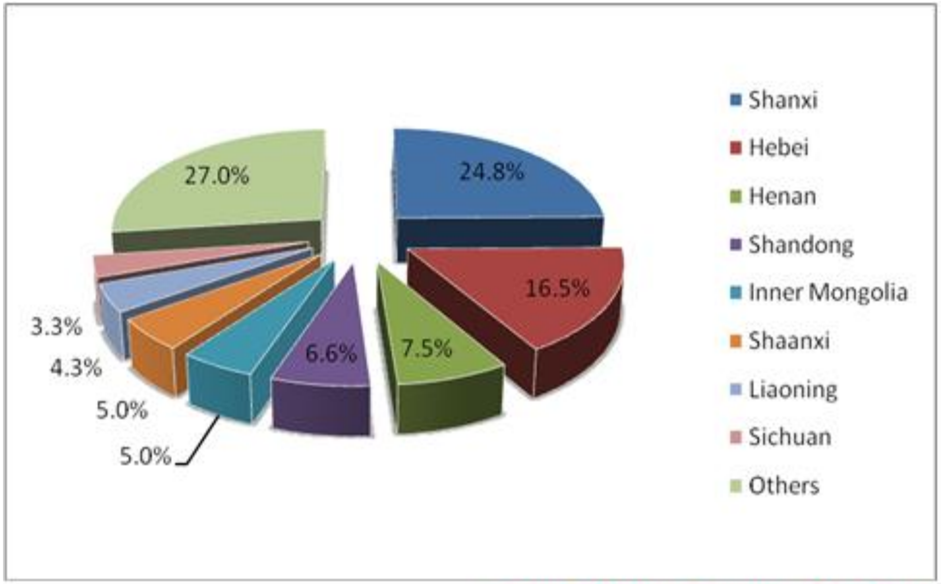
Abstract

In 2012, China's economy slowed down, iron and steel companies restricted production due to losses, coke prices kept falling, and the coking industry was sluggish. Overall, the coking industry was confronted with the oversupply. In the same year, China produced 18 million tons of coal tar, and its apparent consumption approximated 16 million tons.

72% of China's coal tar capacity is distributed in North China (43%) and East China (29%). As a major coal producing province, Shanxi's coal tar output accounts for 24.8% of the national total, ranking first in China; Hebei contributes 16.5%, ranking second; and Henan shares 7.5%, being the third.

In China, coal tar is mainly consumed in deep processing and carbon black. Meanwhile, a small amount of coal tar is exported or used to produce gasoline and diesel through high-pressure hydrogenation. In 2012, the total designed processing capacity of the coal tar deep-processing industry reached 17 million tons, and the actual processing capacity hit 13 million tons. In the same year, China produced 3.7 million tons of carbon black and consumed about 6.8 million tons of coal tar, equivalent to 38% of the actual coal tar output.

Output Share of Coal Tar by Regions in China, 2012



Source: National Bureau of Statistics, ResearchInChina *China Coal Tar Industry Report, 2012-2015*

As for export, the domestic coal tar capacity has been expanding in recent years. However, as China controls the export of coal tar and other resources as well as China's demand grows rapidly, the coal tar export volume has showed a downward trend, only arriving at 52,500 tons in 2012.

Shanxi Coking invested RMB49.3526 million in expanding or transforming CDQ, methanol and alkene projects in 2012. The company plans to invest RMB62.7 billion in developing the capacity by the end of 2015: 15 million tons / a coke, 1.8 million t/a methanol, 600,000 t/a alkene (300,000 t/a polyethylene and 300,000 t/a polypropylene), 20,000 t/a ultra-high-power graphite electrodes, 100,000 t/a coal needle coke, 80,000 t/a carbon black, 600,000 t/a coal tar and 150,000 t/a crude benzene.

Baosteel Chemical is China's largest and most competitive coal tar processing enterprise, with the annual coal tar capacity of 750,000 tons, coke oven gas 3.1 billion cubic meters, crude benzene 250,000 tons and carbon black 150,000 tons.

The report falls into 7 chapters, analyzes the development environments of China coal tar industry in details, makes in-depth study on China's coal tar supply and demand, upstream and downstream sectors, as well as the status quo in Shanxi, Hebei and other key regions. It introduces the operation of 10 Chinese coking companies, and predicts the future development trends of Chinese coal tar industry.

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