



**Global and China Needle Coke Industry  
Report,2012-2015**

**July 2013**

## 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

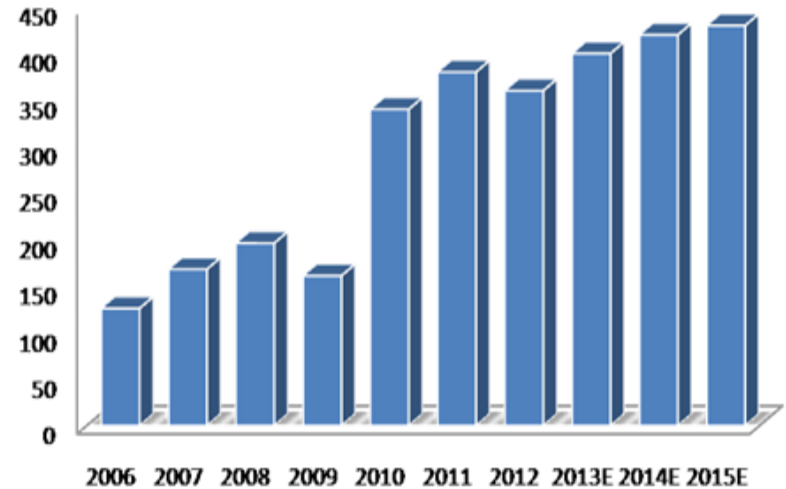
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

## Abstract

Needle coke mainly finds application in graphite electrode for electric steelmaking and in areas of lithium battery, nuclear power, aerospace, etc. Since 2009, the global demand for needle coke has shoot up in the wake of the gradual recovery in the industrial downstream. During the same period, the world's industrial magnates have taken no actions to expand their capacities in a massive scale, out of consideration for holding precedence in prices, leading to lingeringly strained supply all over the world with the supply-demand gap in 2012 hitting 100,000 tons. In particular, China was the most distinctive with the short supply gapping 120,000 tons among the world's leading needle coke consumers.

As the largest steel producer in the world, China has been maintaining huge demand for needle cokes. Moreover, ultra-high power graphite electrode is occupying increasing proportion as a result of continuously optimizing product structure in the graphite electrode industry, which, in turn, further fuels the demand for needle cokes. At the same time, China has smaller amount of needle coke enterprises which feature weak technological base and are huddled by the uncertainty of stable production and product quality. Thus, the needle coke capacity in China has seen slow growth with the supply gap increasingly widening. In 2009-2012, China's demand for needle coke soared from 161,000 tons to 360,000 tons with the CAGR of 30.8% while the annual capacity surged from 130,000 tons to 240,000 tons with the CAGR of 22.7%. Given that most new industrial players encounter technical huddles and that industrial veterans witness limited capacity growth, the supply shortage is projected to go on in the upcoming two years.

Needle Coke Demand in China, 2006-2015E (kt)



Source: ResearchInChina Global and China Needle Coke Industry Report, 2012-2015

As China is rich in coal and poor in oil, the supply of coal-based needle coke raw materials is abundant and China is technologically advanced in this regard. Nationwide, the existing needle coke capacity and most of planned and ongoing needle coke capacities are coal based needle cokes rather than oil-based needle cokes. Presently, large-sized ultra-high power graphite electrode products have become the mainstream in the graphite electrode industry. Because of its unique properties, oil-based needle cokes are ideal to make large-sized ultra-high power graphite electrode products. Hence, China needle coke market is witnessing structural imbalance between supply and demand.

Internationally, oil-based needle coke production technology is dominated by the US, Britain and Japan while the coal-based needle coke production technology is monopolized by Japan. ConocoPhillips, the world's biggest producer of oil-based needle coke, realizes the needle coke capacity of 370,000 tons/a and the figure keeps stable in recent years. And the tycoon serves as one of benchmark makers when it comes to the oil-based needle coke prices globally.

Seadrift is the world's second largest oil-based needle coke maker with the capacity recording 150,000 tons/a. In 2012, it was taken over by GTI, America's largest graphite electrode manufacturer. According to GTI planning, the long-term capacity of the company will reach 240,000-25,000 tons/a.

C-Chem is a professional carbon product maker under Nippon Steel, and the world's largest coal-based needle coke producer. In recent years, its needle coke capacity has greatly boosted through capacity expansion with the figure in 2012 soaring to 170,000 tons/a.

The 6-chapter report conducts an in-depth analysis on the development background and market pattern of global and China needle coke industry, highlights the business performance of 16 large industrial players at home and abroad, and predicts the development trend of the industry.

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