



Global and China Isostatic Graphite Industry Report, 2013-2015

Sep. 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.

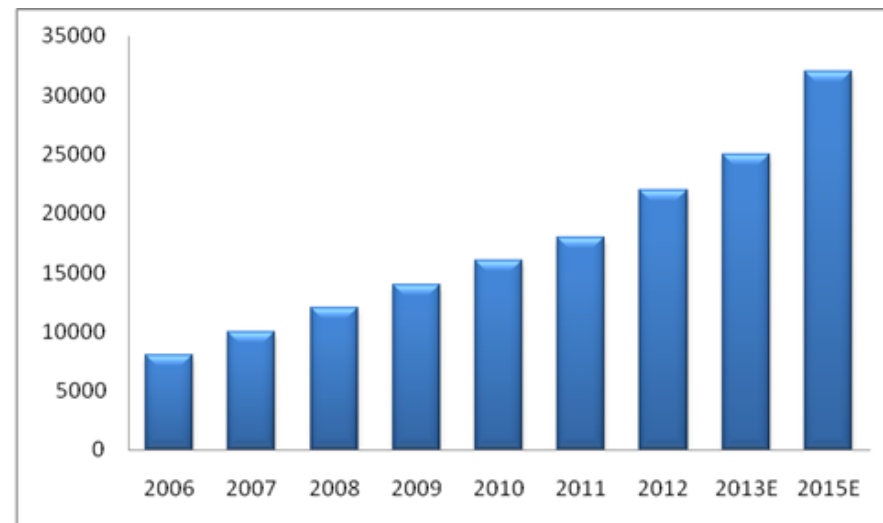
Abstract

Isostatic graphite as a kind of high-tech core basic raw material has a wide range of applications in photovoltaic, electrical discharge machining, optical fiber manufacturing, new nuclear power and other fields. After 2006, the rapid rise of the global PV industry quickly broke the original isostatic graphite market supply and demand balance, the market supply has been increasingly tight. In this context, isostatic graphite manufacturing giants in the United States, Japan, Europe and other places have invested heavily in succession to expand production capacity significantly, so as to ease the strained market supply somewhat. In 2012, the global isostatic graphite market supply gap was merely 1,000 tons. During the current round of isostatic graphite capacity expansion, China has become a popular investment area and the most important consumer market.

As the world's manufacturing powerhouse and the largest producer of photovoltaic products, China has maintained a huge amount of demand for isostatic graphite. In recent years, with the swift and violent development of the domestic photovoltaic industry, the demand has shown a trend of year-by-year expansion. During the corresponding period, due to the weak technological base of local isostatic graphite manufacturers coupled with technical blockade of foreign enterprises, China's isostatic graphite production and quality have not been effectively improved.

In 2012, despite a crisis encountered by the photovoltaic industry, China still held demand of 22,000 tons for isostatic graphite, while isostatic graphite production over the same period was only 16,500 tons, with supply gap up to 5,500 tons. For Chinese enterprises newly involved in the isostatic graphite business, there is currently a widespread lack of technical reserves, unreasonable product structure and other issues, which are difficult to be solved shortly. Therefore, it is expected that China's large-size, fine-structure, high-end isostatic graphite product market supply over the next few years will still remain tight.

Demand for Isostatic Graphite in China, 2006-2015 (Unit: ton)



Source: ResearchInChina Global and China Isostatic Graphite Industry Report, 2013-2015

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Foreign isostatic graphite production is mainly concentrated in three enterprises, i.e. Japan-based Toyo Tanso Co., Ltd., France-based Mersen Group and Germany-based SGL Group, all with production bases in China.

Toyo Tanso as the world's largest isostatic graphite enterprise reached isostatic graphite production capacity of 11,000 tons/year in 2012, with products covering the main downstream areas. For now, the company's 4,000-ton isostatic graphite production line is still under construction, once put into production, the total isostatic graphite production capacity will amount to 15,000 tons / year.

Mersen (Ex LCL) is the world's first isostatic graphite production enterprise that sets up production base in China. In 2012, the completion of the Chongqing base capacity expansion project made its isostatic graphite capacity up to 12,000 tons/year.

After the acquisition of Chengdu Carbon Co., Ltd., Fangda Carbon New Material Co., Ltd. became the only local owner of mature isostatic graphite production technology. In 2012, the company's isostatic graphite capacity achieved 4,000 tons/year. Currently, its 30,000 tons/a special graphite project has been approved by the general meeting of stockholders, the forward isostatic graphite production capacity is expected to hit 24,000 tons/year.

Based on retained data, Global and China Isostatic Graphite Industry Report, 2013-2015 consisting of six chapters makes an in-depth analysis of the development background and market pattern for global and China isostatic graphite industry as well as a detailed analysis on operating conditions of 18 large-scale domestic and foreign enterprises (Toyo Tanso, Mersen, SGL, Fangda Carbon New Material, etc.), but also predicts the isostatic graphite industry trends.

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