



China Coal Tar Industry Report, 2013-2016

Apr. 2014

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

Amid China's economic slowdown in 2013, the coke price continued to fall and the coking industry remained weak, thus the situation of oversupply would not get changed in the short term. In 2005-2013, China's total coal tar output grew year by year with the rising coke output, at an annual average growth rate of 9.9%. The output in 2013 jumped 16% year on year to 20 million tons. Affected by material supply, 61.1% of domestic coal tar capacity is concentrated in the coal-rich North China (40%) and East China (21.1%). Shanxi as an important coal-producing province contributes 25.2% to the country's total coal tar output, ranking first; Hebei takes second place with 16.1%; followed by Henan with 7.6%.

In China, deep processing and carbon black consume more than 90% of coal tar, and a small amount of coal tar is exported or used to produce gasoline and diesel oil via high-pressure hydrogenation. China has few high-quality and high value-added coal tar deep-processed products. In 2013, Chinese coal tar deep-processing industry represented actual processing capacity of 11 million tons (total design processing capacity of 23 million tons), up 20.7% year on year. In the same year, the operating rate of carbon black processing units hit same year, the operating rate of carbon black processing units hit around 60%, with actual output of 3.8 million tons and coal tar consumption of 3.26 million tons.

In 2013, Xinjiang Baoshun's 300,000 tons/a Coal Tar Deep-processing Project (Phase I) and Shandong Baoshun's 600,000 tons/a Coal Tar Deep-processing Project went into operation, making Baoshun's total capacity realizing 1.55 million tons/a, accounting for 6.7 % of China's total coal tar deep-processing capacity and surpassing Shanghai Baosteel Chemical Co., Ltd. (hereinafter referred to as Baochem) to become the largest coal tar deep-processing enterprise in China.

As the country's most competitive coal tar processing enterprise in China, Baochem can produce 750,000 tons of coal tar, 3.1 billion cubic meters of coke oven gas, 250,000 tons of crude benzene and 150,000 tons of carbon black annually.

Wuhan Iron And Steel (Group) Corp. put its 500,000 tons/a Coal Tar Project – Phase I into production in 2013 to fill the blank of the coal chemical industry in Wuhan; the Phase II is under construction, expected to go into operation in 2015.

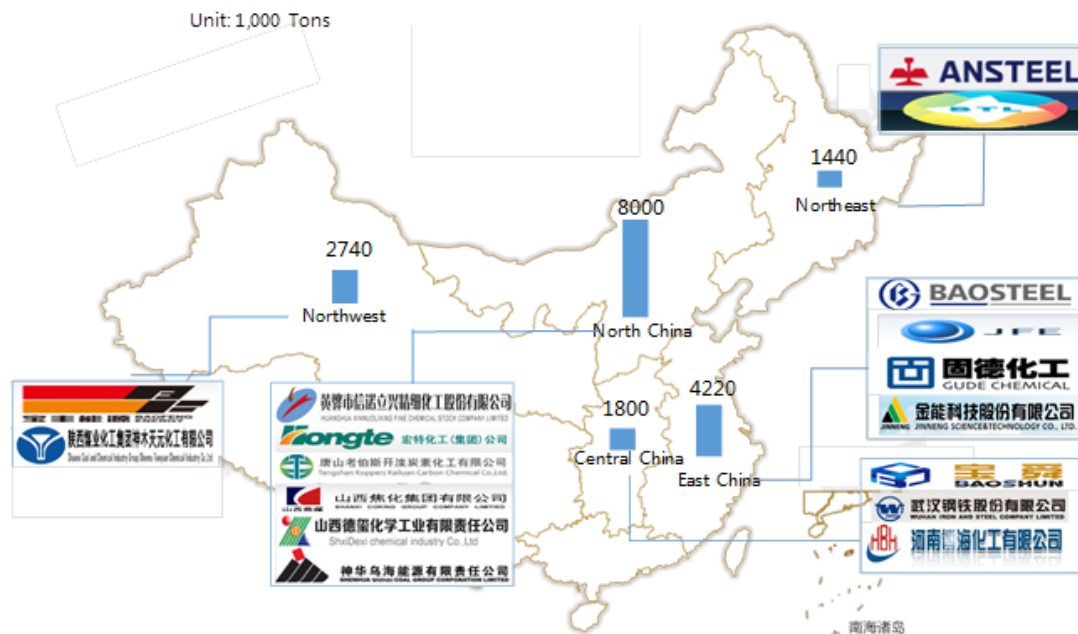
Shanxi Coking Co., Ltd, one of China's largest independent coking enterprises, is actively planning a 10,000-ton-level coal-coking integration project on the basis of coal-coking industrial layout of 3.6 million tons/a coke, 300,000 tons/a coal tar, 100,000 tons/a crude benzene, etc..

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The report mainly includes the following aspects:

- ✘ Development environment, regional pattern, corporate competition, trend, etc. of coal tar industry in China;
- ✘ Supply and demand, import and export, price, upstream and downstream sectors, etc. of coal tar industry in China;
- ✘ Operation, coal tar business, etc. of 17 global and Chinese coal tar enterprises e.g. Koppers, Shanxi Coking, Shanxi Hongte, Henan Baoshun, Baochem.

Output of Coal Tar by Regions & Key Enterprises in China, 2013



Sources - China Coal Tar Industry Report, 2013-2016; ResearchInChina

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1. Overview of Coal Tar

- 1.1 Definition & Classification
- 1.2 Preparation
- 1.3 Application
- 1.4 Key Technologies
 - 1.4.1 Coal Tar Distillation Technology
 - 1.4.2 Industrial Naphthalene Distillation Technology
 - 1.4.3 Elution Technology of Fraction from Coal Tar Distillation
 - 1.4.4 Refining Technology of Crude Anthracene
 - 1.4.5 Decomposition Technology of Hydroxybenzene Natrium Salt
 - 1.4.6 Refining Technology of Naphthalene
 - 1.4.7 Crude Hydroxybenzene Refining Technology
 - 1.4.8 Refining Technology of Crude Pyridine and Crude Quinoline
 - 1.4.9 Producing Technology of Refined Anthracene, Refined Carbazole and Anthraquinone

2. Development of China Coal Tar Industry

- 2.1 Policy Environment
- 2.2 Supply
- 2.3 Demand
 - 2.3.1 From Coal Tar Deep Processing
 - 2.3.2 From Carbon Black
 - 2.3.3 From Fuel
- 2.4 Import and Export
 - 2.4.1 Export
 - 2.4.2 Import
- 2.5 Price

3. Status Quo of Coal and Coking Industry

- 3.1 Coal Industry
 - 3.1.1 Production and Marketing
 - 3.1.2 Import and Export
 - 3.1.3 Price
- 3.2 Coking Industry
 - 3.2.1 Production
 - 3.2.2 Export
 - 3.2.3 Price

4. Status Quo of Coal Tar Processing in China

- 4.1 Processing Capacity of Coal Tar in China
 - 4.1.1 Capacity of Enterprise
 - 4.1.2 Capacity of Key Product Provinces
- 4.2 Coal Tar Deep Processing Projects in China
 - 4.2.1 Projects Planned and under Construction, 2010-2014
 - 4.2.2 Key Coal Tar Processing Projects and Progress
- 4.3 Coal Tar Processing Techniques at Home and Abroad
 - 4.3.1 Abroad
 - 4.3.2 China
- 4.4 Phenol Oil
 - 4.4.1 Phenol

5. Coal Tar Industry Competition in China

- 5.1 Regional Competition
 - 5.1.1 Shanxi
 - 5.1.2 Hebei
 - 5.1.3 Shandong
- 5.2 Competition among Enterprises
- 5.3 Product Competition

6. Key Enterprises Worldwide

- 6.1 Koppers Holdings Inc.
 - 6.1.1 Profile

6.1.2 Operation

6.1.3 KCCC

6.1.4 TKK

6.1.5 Project in China

6.2 RütGERS Group

6.2.1 Profile

6.2.2 Operation

6.3 Nippon Steel & Sumikin Chemical Co. Ltd

6.3.1 Profile

6.3.2 Operation

7. Key Enterprises in China

7.1 Shanxi Coking Co., Ltd

7.1.1 Profile

7.1.2 Operation

7.1.3 Revenue Structure

7.1.4 Gross Margin

7.1.5 Investment

7.1.6 Prospect and Forecast

7.2 Shanxi Hongte Coal Chemical Industry Co., Ltd.

7.2.1 Profile

7.2.2 Production Capacity Expansion

7.2.3 Operation

7.2.4 Key Projects

7.3 Shanghai Baosteel Chemical Co., Ltd

7.3.1 Profile

7.3.2 Operation

7.3.3 Key Projects

7.3.4 Development Strategy

7.4 Henan Baoshun Chemical Technology Co., Ltd.

7.4.1 Profile

7.4.2 Operation

7.4.3 Key Projects

7.5 Wuhan Iron And Steel (Group) Corp. (WISCO)

7.5.1 Profile

7.5.2 Operation

7.5.3 Coal Tar Business

7.6 Jiangxi BLACKCAT Carbon Black Inc., Ltd.

7.6.1 Profile

7.6.2 Operation

7.6.3 Revenue Structure

7.6.4 Gross Margin

7.6.5 Prospect and Forecast

7.7 Guanghui Energy Co., Ltd.

7.7.1 Profile

7.7.2 Operation

7.7.3 Coal Tar Business

7.8 Jiangsu Sihuan Bioengineering Co., Ltd

7.8.1 Profile

7.8.2 Operation

7.8.3 Coal Tar Business

7.9 Huanghua Xinnuo Lixing Coal Chemical Co., Ltd

7.9.1 Profile

7.9.2 Operation

7.9.3 Export

7.9.4 Key Projects

7.10 Shenmu Tianyuan Chemical Co., Ltd. of Shaanxi Coal and Chemical Industry Group

7.10.1 Profile

7.10.2 Operation

7.10.3 Development Plan

7.11 JFE Zhenxing Shandong Chemical Company Ltd

7.11.1 Profile

7.11.2 Production Capacity Expansion

7.11.3 Operation

7.12 Others

7.12.1 Anshan Chemical Plant

7.12.2 Shandong Zhenxing Coking & Chemicals Co., Ltd.

7.12.3 Henan Bohai Coal Chemical Co., Ltd

8. Development Trend

8.1 Summary

8.2 Forecast

- Main Products and Applications of High Temperature Coal Tar
- Policies Relevant to China's Coal Chemical Industry
- Output of Coke and Coal Tar in China, 2005-2013
- Output Share of Coal Tar by Regions in China, 2013
- Consumption Structure of Coal Tar in China, 2013
- Processed Volume of Coal Tar in China, 2004-2013
- Carbon Black Output and Raw oil Consumption Volume for Carbon Black in China, 2006-2013
- Export Volume of Coal Tar in China, 2004-2012
- Export of Coal Tar in China (by Country), 2012
- Import Volume of Coal Tar in China, 2004-2013
- Import of Coal Tar in China (by Country), 2012
- Coal Tar Price Trend in China, 2009-2013
- Raw Coal Output in China, 2004-2013
- Coal Import & Export Volume in China, 2004-2013
- China's Bohai Rim Steam Coal (Q5500K) Price, 2010-2014
- Output and Apparent Consumption of Coke in China, 2006-2013
- Export Volume of Coke in China, 2006-2013
- Processing Capacity of Coal Tar in China, 2005-2013
- Coal Tar Projects Planned and under Construction in China (by Region), 2010-2013
- Coal Tar Deep-processing Techniques and Characteristics
- Coal Tar Processing Procedure in China
- Phenol Manufacturers and Output in China, 2009-2013
- Phenol Export & Import Volume and Price in China, 2009-2014
- O-cresol Import & Export Volume and Value in China, 2008-2013
- Output of Industrial Naphthalene in China, 2005-2013

- Consumption Structure of Industrial Naphthalene in China, 2013
- Industrial Naphthalene Import Volume and Price in China, 2007-2012
- China's Industrial Naphthalene Price Index, 2013-2014
- Import & Export Volume and Value of Coal Tar Pitch in China, 2008-2014
- Distribution of China's Coal Tar Output, 2012-2013
- Capacities of Key Enterprises Involved in Coal Tar Deep-processing in Shanxi, 2013
- Capacities of Key Enterprises Involved in Coal Tar Deep-processing in Hebei, 2013
- Capacities of Key Enterprises Involved in Coal Tar Deep-processing in Shandong, 2013
- Capacities of Key Enterprises Involved in Coal Tar Deep-processing in China, 2014
- Carbon Materials and Chemicals Products of Koppers
- Revenue and Income of CM&C products of Koppers, 2012—2013
- CM&C Business Revenue Breakdown by Products of Koppers, 2010-2012
- Subsidiaries and Production Capacity of Rutgers
- Revenue and Net Income of Nippon Steel Chemical, FY2009-FY2013
- Production Capacity and Products of Coal Tar Processers worldwide, 2014
- Revenue and Net Income of Shanxi Coking, 2008-2013
- Revenue of Shanxi Coking (by Product), 2009-2013
- Output of Shanxi Coking Co., Ltd (by Product), 2010-2013
- Gross Margin of Shanxi Coking (by Product), 2009-2013
- Investment of Projects under construction of Shanxi Coking, 2013
- Revenue and Net Income of Shanxi Coking, 2012-2016E
- Sales of Shanxi Hongte Coal Chemical Industry Co., Ltd, 2005-2011
- Key Projects of Shanxi Hongte Coal Chemical Industry Co., Ltd, 2011-2016
- Sales of Baosteel Chemical, 2007-2012
- Deep-processing Capacities of Main Products of Henan Baoshun Chemical Technology Co., Ltd, 2013

- Revenue and Net Income of Wuhan Iron and Steel, 2008-2013
- Revenue and Net Income of Black Cat, 2009-2013
- Revenue Breakdown of Black Cat by Product, 2010-2013
- Domestic and Overseas Revenue of Black Cat, 2009-2013
- Gross Margin of Black Cat by Product, 2009-2013
- Revenue and Net Income of Black Cat, 2012-2016E
- Revenue and Net Income of Guanghai Energy, 2008-2013
- Revenue and Net Income of Sihuan Bioengineering, 2008-2013
- Total Export Value of Huanghua Xinnuo Lixing Coal Chemical, 2009-2013
- Key Projects of Huanghua Xinnuo Lixing Coal Chemical, 2004-2014
- Capacities of Key Enterprises in Coal Tar Deep-processing in China, 2013
- China's Coal Tar Capacity and Deep-processing Capacity, 2005-2013
- China's Coal Tar Capacity, 2012-2016E
- China's Coal Tar Deep-processing Capacity, 2012-2016E

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