Global and China Isostatic Graphite Industry Report, 2013-2016

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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

After 2006, the rapid rise of the global PV industry quickly broke the original supply and demand equilibrium of the isostatic graphite market and made the supply become increasingly tight. In this context, isostatic graphite giants in America, Japan, Europe or other countries and regions started investing heavily to expand their production capacity, easing the shortage of market supply. In 2013, with the increased support and investment in PV industry in China, the global isostatic graphite supply and supply gap widened to 1,500 tons.

China has been a hot investment spot for isostatic graphite sector and the most important consumer market of isostatic graphite in the world. In recent years, with the rapid development of Chinese photovoltaic industry, China's isostatic graphite demand is increasing year after year. In 2013, China's demand for isostatic graphite exceeded 25 kt, while output during the same period was merely less than 20 kt, the supply and demand gap being about 5 kt.

At the same time, due to the weak technical capability of domestic Chinese isostatic graphite enterprises and the technical blockage put up by foreign enterprises, the output and quality of isostatic graphite manufactured by Chinese companies have not been improved much. At present, the new Chinese entrants into isostatic graphite sector generally lack of technical reserves and have unreasonable product structure and other problems, and these problems are hard to be addressed in the short term. Therefore, in the next few years, the market supply of high-end large size and fine-structure isostatic graphite in China will remain tight.

Foreign isostatic graphite is mainly produced by Japanese TOYO TANSO, French Mersen Group and German SGL Group, all of which have production bases in China.

TOYO TANSO is the world's largest isostatic graphite manufacturer with isostatic graphite plants in Shanghai and Jiaxiang County, Shandong Province. Along with the commissioning of its 4 kt/a isostatic graphite production line in Japan at the end of 2013, its total output of isostatic graphite products had reached 15 kt/a.

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Mersen, the former French LCL, is the first foreign company to set up isostatic graphite production base in China. In 2012, the completion of its capacity expansion project in Chongqing made its global isostatic graphite production capacity reach 12 kt/a.

SGL Group is a multinational carbon product manufacturer from Germany. Currently it has isostatic graphite production bases in Bonn, Germany and Yangquan City, Shanxi Province, China. In July 2010, it announced to invest EUR 75 million to increase its isostatic graphite production capacity from 10 kt/a to 15 kt/a, but the project is still under construction and is expected to be put into operation at the end of 2014.

After the acquisition on Chengdu Carbon Co., Ltd, Fangda Carbon New Material Co., Ltd has become the sole Chinese company boasting mature isostatic graphite production technology. Its 20 kt/a isostatic graphite project officially began construction in 2013, and once completed, Fangda Carbon's isostatic graphite capacity will reach 24 kt/a.

"Global and China Isostatic Graphite Industry Report, 2013-2016" by ResearchInChina covers the following:

※ Global isostatic graphite supply and demand, competition pattern and isostatic graphite industry development situation in major countries and regions.

※ Isostatic graphite industry development environment in China, market supply and demand, and forecast for the next three years, competition pattern, import and export, and capacity of top 11 companies.

※ Downstream and upstream markets of China isostatic graphite industry.

※ Operations of 22 global and Chinese companies (including Toyo Tanso, Mersen, SGL and Fangda Carbon) and analysis of their isostatic graphite business.

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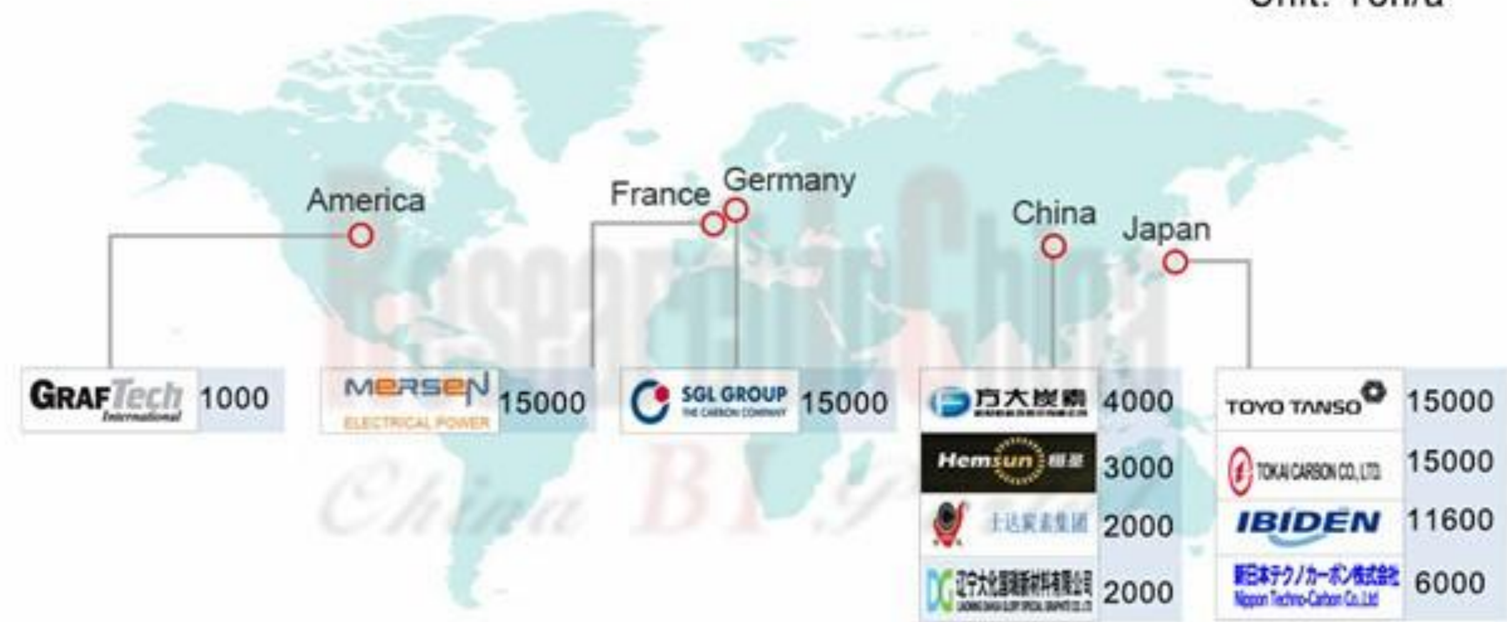
Capacity of Major Global Isostatic Graphite Manufactures, 2014

Unit: Ton/a



Sources: Global and China Isostatic Graphite Industry, 2013-2016; ResearchInChina

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