China Coal Tar Industry Report, 2014-2017

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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

Coal tar, a by-product of coke production, sees its output change with coke output.

During 2005-2014, with China's increased demand for steel, coke output grew at an AAGR of 8.3%, reaching 476.90 million tons in 2014, with actual amount of coal tar recycled amounting to about 15.70 million tons. Coal tar producing areas are focused on Shanxi, Hebei, Shandong, etc, of which Shanxi contributed around 18% of the country's total output in 2014.

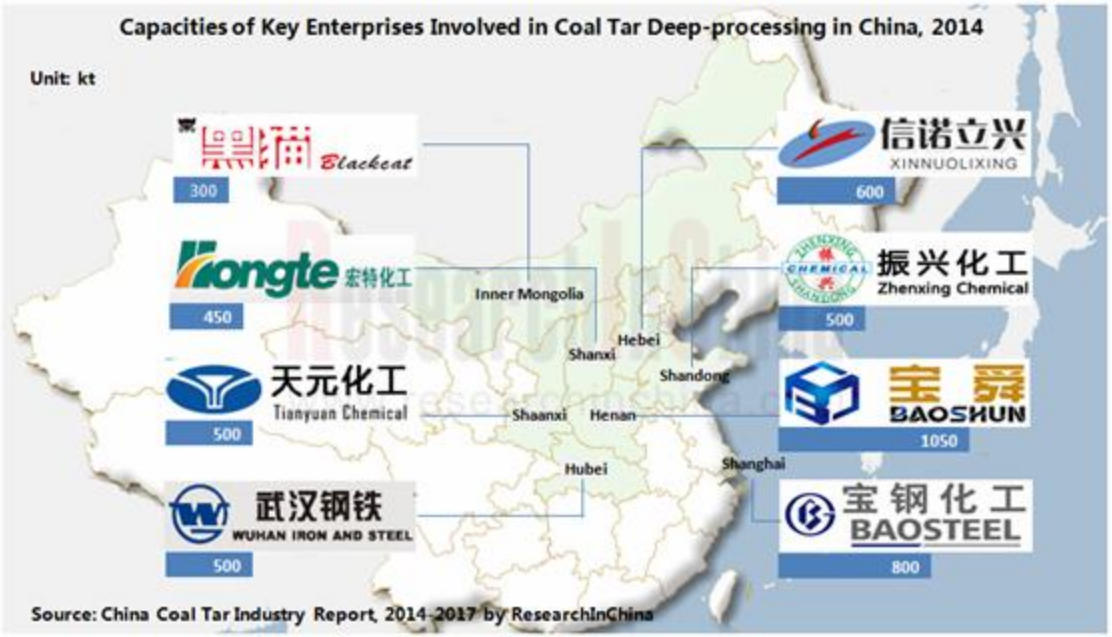
Main consumption markets of coal tar in China are deep-processed products (including phenol, anthracene, industrial naphthalene, coal tar pitch, etc.) and carbon black, with the former accounting for roughly 75% of coal tar consumption in 2014, the year in which China's deep-processing amount of coal tar touched 11.40 million tons or so, registering a CAGR of 13.3% over the last decade.

Coal tar deep-processed products are important raw materials for pharmaceuticals, agricultural chemicals, dyes, and synthetic fibers, with strong profitability, leading to investment in coal tar deep-processing projects by a large number of companies in China in recent years. In 2014, China boasted coal tar deep-processing capacity of 24.10 million tons, concentrated mainly in North China and East China, which together occupied a proportion of more than 60%.

There are more coal tar deep-processing companies in China with fierce industrial competition. In order to promote sound development of the industry and gradually eliminate backward capacities, the Ministry of Industry and Information Technology in Mar 2014 issued Access Conditions of Coking Industry, providing that anhydrous coal tar processing capacity of single facility shall be no less than 150 kt/a. In 2014, the top3 coal tar deep-processing companies in terms of capacity were Henan Baoshun Chemical Technology Co., Ltd. (1,050 kt), Shanghai Baosteel Chemical Co., Ltd. (800 kt), and Huanghua Xinnuo Lixing Fine Chemical Co., Ltd. (600 kt).

Henan Baoshun Chemical Technology Co., Ltd. has three coal tar processing bases, namely, Henan headquarters, Shandong Baoshun, and Xinjiang Baoshun, with the first now having coal tar processing capacity of 450 kt/a after closing down 200 kt in 2013, and the latter two each 300 kt/a, which was put into operation in Nov 2011 and May 2013, respectively.

Shanghai Baosteel Chemical Co., Ltd. now has coal tar processing capacity of 800 kt/a. In addition, the company, together with Inner Mongolia Yellow River Energy Technology Group, set up Wuhai Baohua Wanchen Coal Chemical Co., Ltd, to build projects of 600 kt/a coal tar deep processing, 200 kt/a carbon black, 100 kt/a benzene hydrogenation, 50 kt/a needle coke, and 50 kt/a ultra-high power electrode. The Phase I 300 kt coal tar processing project had gone into operation in Dec. 2014.



China Coal Tar Industry Report, 2014-2017 by ResearchInChina highlights the following:

※ Supply & demand, import & export, competitive landscape, price trend, and development forecast of the Chinese coal tar market;

※ Supply & demand, import & export, and price trend of the Chinese coal and coke markets;

※ Supply & demand, import & export, and price trend of the Chinese coal tar deep-processed products market (phenol oil, industrial naphthalene);

※ Operation, coal tar business, and development forecast of 17 global and Chinese coal tar processing companies.

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