China Activated Carbon 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

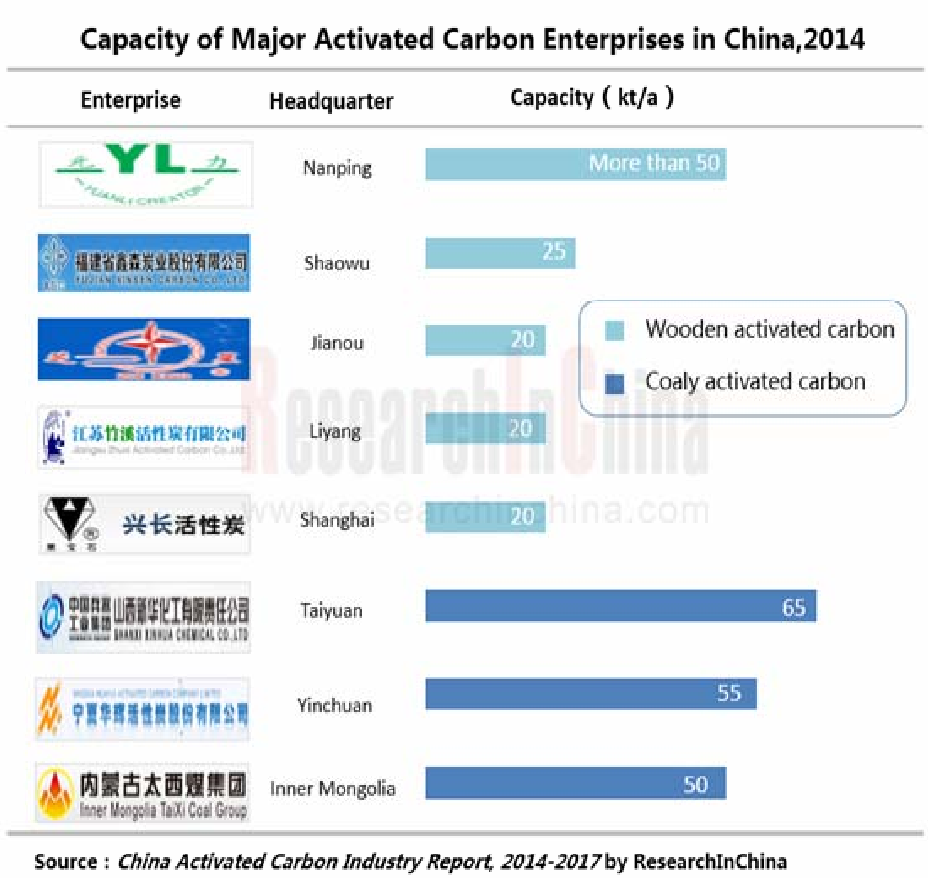
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Over the recent years, the global activated carbon consumption has kept growing with an AAGR of 5.5% or so, approximating 1.437 million tons in 2014. With the rising demand from the global industrial environmental protection, home/automotive environmental protection, water purification and other fields, the world's demand for activated carbon is expected to hit 1.733 million tons in 2017.

The global capacity of activated carbon is mainly concentrated in the United States, Japan, France and a few other developed countries as well as some developing countries like China and the Philippines who abound in raw materials. The United States, Japan and France devote themselves to producing medium and high-end activated carbon products, while China manufactures low- and medium-end products with inferior quality and low added value.

However, China is the world's largest producer of activated carbon in terms of capacity, accounting for 43.2% of the global capacity. China's activated carbon output was about 588,800 tons in 2014. As China's environmental awareness gets enhanced and environmental protection policies tightened, China's demand for activated carbon will present a CAGR of up to 6% in the next 3-5 years, higher than the global level.



China is also a major exporter of activated carbon. However, Chinese activated carbon with a focus on low-end products suffers anti-dumping investigations of some countries, thereby affecting the export in near future. In 2014, China exported 53,960 tons of wooden activated carbon and 191,550 tons of other types of activated carbon.

At present, Chinese medium and high-end activated carbon markets are dominated by Calgon, Meadwestvaco, Cabot, CECA, Kuraray and Osaka Gas Chemicals, who enter China usually by acquisitions or establishing plants with investments. Calgon has established three wholly-owned subsidiaries in China, namely Calgon Carbon (Tianjin), Datong Carbon Corporation and Calgon Carbon (Suzhou).

In China, activated carbon falls into wooden activated carbon and coaly activated carbon, which occupy 65.2% and 34.8% of the total output in 2014 respectively.

The leading Chinese producers of wooden activated carbon are represented by Fujian Yuanli Active Carbon, Fujian Xinsen Carbon, Zhixing Activated Carbon, Zhuxi Activated Carbon, etc.. Fujian Yuanli Active Carbon, a leader of the industry, sold 53,500 tons of activated carbon in 2014, up 11.2% year on year.

Among Chinese coaly activated carbon enterprises -- Xinhua Chemical, Huahui Activated Carbon and Taixi Coal, Xinhua Chemical ranked first with the capacity of 65,000 tons in 2014. However, Datong Coal Jinding Activated Carbon may surpass Xinhua Chemical to become the champion with the annual capacity of 100,000 tons by the end of 2015.

The report highlights the followings:

- Overview of the global activated carbon industry, including status quo and major countries and regions;
- Overview of China activated carbon industry, embracing status quo, development environments, import and export, competitive landscape, upstream and downstream sectors, and development trends;
- Six foreign activated carbon manufacturers and 19 Chinese counterparts, covering profile, operation, activated carbon business, etc..

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