



# **Global and China Isostatic Graphite Industry Report, 2015-2018**

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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

Isostatic graphite is a new type of graphite material developed in the 1960s. It has seen a wide range of applications in photovoltaic, electrical discharge machining, metallurgy, new nuclear power, and other fields.

In 2006, the rapid rise of global photovoltaic industry broke the original balance between supply and demand of isostatic graphite market, which promoted isostatic graphite production companies to expand capacity successively to meet the needs of photovoltaic market. China as the world's largest producer of photovoltaic products therefore becomes a hot investment area of isostatic graphite capacity expansion and the most important product consumer market.

In 2012, the global photovoltaic industry encountered a severe overcapacity crisis, although the isostatic graphite industry maintained output growth thanks to newly-added capacity, corporate profitability declined sharply. In 2013, China introduced a series of stimulus policies to gradually recover the photovoltaic industry, and then kept the increase in demand for isostatic graphite. In 2015, the global isostatic graphite production reached around 100 kilotons.

Isostatic graphite is mainly produced by Japanese, European and American companies. Among them, Japan-based TOYO TANSO, Tokai, IBIDEN, Germany-based SGL, and France-based Mersen boast capacity of over 10 kilotons. And, SGL, Mersen and TOYO TANSO have production bases in China.

Since 2006, with the dramatic development of photovoltaic industry and fast-expanding demand for isostatic graphite in China, Mersen, SGL and other foreign companies have built factories in China, plus the ever-growing number of isostatic graphite projects invested by local companies, China's isostatic graphite capacity has seen vigorous growth, making the country one of the important isostatic graphite producing areas in the world.

In 2015, China's isostatic graphite production reached around 34 kilotons, but there were still about 30% of demand relying on import, mainly for large-size, fine-structure, high-end isostatic graphite products. In China, isostatic graphite is primarily used in photovoltaic industry (more than 60%), and with the nuclear power reboot in 2015, its demand for isostatic graphite increased greatly, with an estimated application ratio of 8% or so.

Major isostatic graphite production enterprises in China are Baofeng Five-star Graphite Co., Ltd., Fangda Carbon New Material Co., Ltd., and Datong Xincheng New Material Co., Ltd., which posted isostatic graphite capacity of 10 kilotons, 4 kilotons and 4 kilotons respectively in 2015. Among them, Datong Xincheng New Material Co., Ltd. put its isostatic graphite capacity into production in September 2015. Besides, there are many proposed / under-construction isostatic graphite projects in China, e.g. Fangda Carbon's 20 kt/a isostatic graphite project.



This report mainly contains:

- Development status, supply and demand, competition pattern and growth prediction of global isostatic graphite industry;
- Development status, supply and demand, competition pattern and growth prediction of Chinese isostatic graphite industry;
- Demand from downstream sectors e.g. photovoltaic, electrical discharge machining and nuclear power for isostatic graphite in China;
- Operation, isostatic graphite business analysis and development prospects of 8 global and 15 Chinese isostatic graphite production enterprises.

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