



China Coal Tar Industry Report, 2016-2020

Jun. 2016

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 is a by-product of coke production, and its output varies with coke output.

In 2007-2014, China's coke output continued to grow, but the growth rate had been declining since 2010. In 2015, due to a downturn in the steel industry, the coke demand shrank sharply, with the output sliding 6.7% year on year. The change in coal tar output was basically the same as that of coke. In 2015, the coal tar output in China approximated 17.7 million tons.

In 2015, China's coal tar production converged in North China and East China, which contributed an aggregate of 57% of the total nationwide. By province, Shanxi, Hebei and Shandong ranked among the top three in terms of coal tar output. Among them, Shanxi constituted China's largest coal and coke producing area, whose coal tar output occupied 17.9%.

In China, coal tar is mainly consumed in deep-processed products (including phenol, anthracene, industrial naphthalene, coal tar pitch, etc.) and carbon black, with 2015's consumption in the two markets accounting for 76% and 22%, respectively.

In 2015, China's coal tar processing capacity totaled 25.5 million tons, and there were a large number of coal tar deep-processing enterprises that went into fierce competition. To promote sound development of the industry and by degrees eliminate backward capacity, the Ministry of Industry and Information Technology (MIIT) issued in 2014 the Access Conditions of Coking Industry, which stipulates that anhydrous coal tar processing capacity of single facility shall be no less than 150 kt/a. It is expected that in the upcoming years China's coal tar processing capacity will slow down, and that capacity concentration will improve.

The Chinese coal tar processing enterprises mainly include Henan Baoshun Chemical Technology, Shanghai Baosteel Chemical, and HuanghuaXinnuoLixing Fine Chemical, whose capacity reached respectively 1.05 million tons, 950,000 tons, and 900,000 tons in 2015. Among them, Baoshun Chemical has three major coal tar bases—Henan headquarters, Shandong Baoshun, and Xinjiang Baoshun, which have the processing capacity of 450,000t/a, 300,000 t/a, and 300,000 t/a, respectively.

In 2015, affected by a combination of factors including China's economic slowdown, a fall in international crude oil prices, weakened demand for downstream products of coal tar, as well as the enforcement of the most stringent environmental protection law, coal tar prices bottomed out. In 2016-2020, China's coal tar industry will still face pressure from environmental protection rectification and excessive industrial capacity reduction. However, with the elimination of backward capacity and the improvement of capacity concentration, we project that in 2017 the coal tar prices will pick up, and that by 2020 China's coal tar output will reach about 20 million tons.

Coal Tar Output and Growth Rate in China, 2007-2015



Source: ResearchInChina

China Coal Tar Industry Report, 2016-2020 by ResearchInChina is mainly concerned with 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, etc.);
- Operation, coal tar business, and development forecast of 15 global and Chinese coal tar processing companies.

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