Global and China Activated Carbon Industry Report, 2017-2021

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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.

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Abstract

Global demand for activated carbon was about 1.65 million tons in 2016, up 6.7% from a year ago, and recorded a CAGR of 6.3% during 2012-2016. As the public become increasingly aware of the harm caused by air and water pollution to health, the demand for activated carbon all over the world will continue to increase, approaching an estimated 2.10 million tons in 2021.

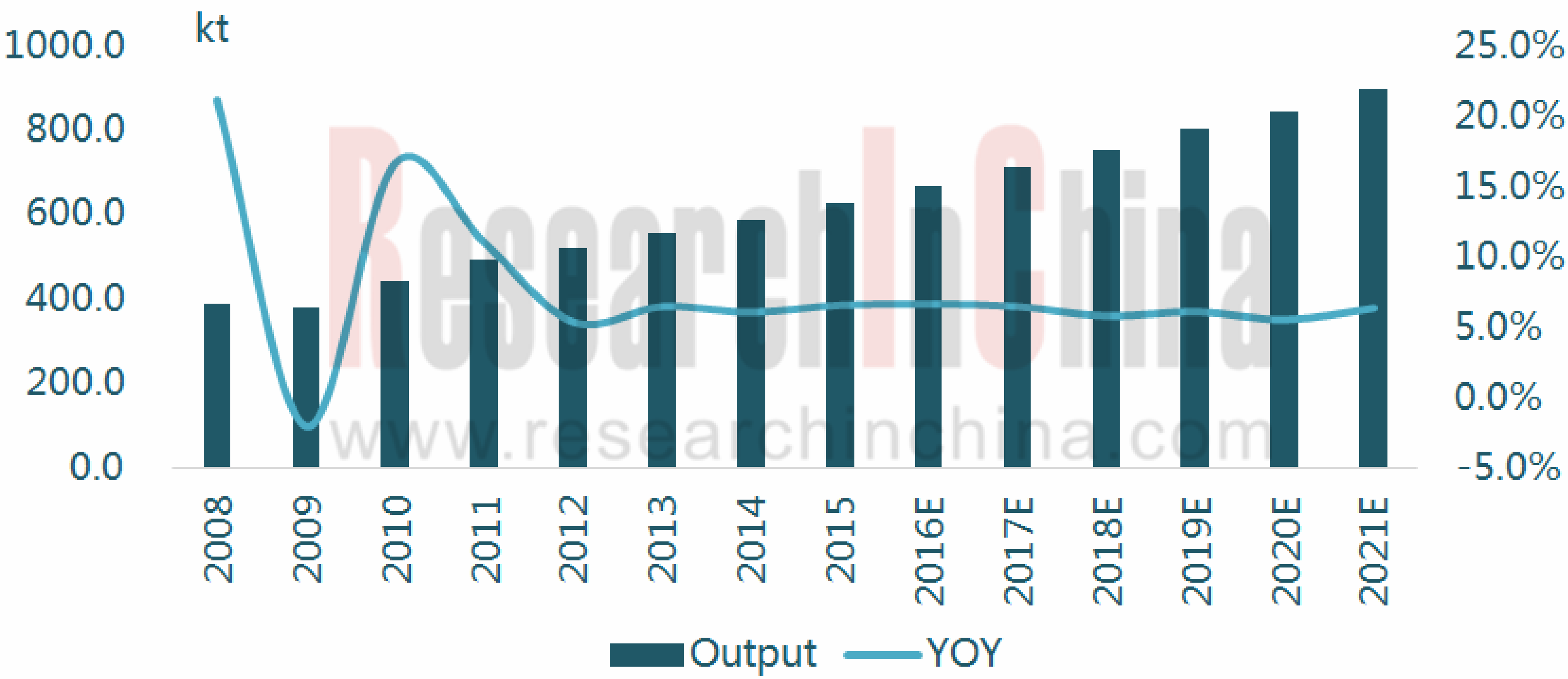
China, the world's second largest consumer of activated carbon just behind the United States, needed about 440,000 tons in 2016, accounting for 26.7% of the global total. Still in the stage of rapid development, the country will witness a continued increase in the application of activated carbon in industry, food & beverage, and sewage treatment with the demand for activated carbon nearing an estimated 600,000 tons in 2021. Meanwhile, the country is also a big activated carbon producer (about 670,000 tons in 2016 and close to 900,000 tons as predicted in 2021).

Activated carbon, according to the material, can be divided into wood-based, coal-based, coconut shell-based, and nutshell-based ones. China produced about 430,000 tons of coal-based activated carbon and over 200,000 tons of wood-based activated carbon in 2016. Due to environmental protection and supply-side reform in the coal industry, the output of coal-based activated carbon will decline, while that of wood-based and coconut shell-based activated carbons will rise steadily.

Price: coconut shell-based activated carbon commands the highest price, above RMB10,000/t, compared with around RMB7,000/t for nutshell-based activated carbon and RMB5,000/t for coal-based activated carbon). The price of coconut shell-based activated carbon has begun falling since Jul 2016 because of enhanced supply capacity of coconut shell activated carbon enterprises and fiercer market competition.

Competitive landscape: among a large number of activated carbon producers in China, only a few have annual capacity of more than 10,000 tons. In 2016, Fujian Yuanli Active Carbon was the champion in the wood-based activated carbon field with a market share of over 20%, while Datong Coal Jinding Activated Carbon took the lead in the coal-based activated carbon field with a market share of over 15%.

Activated Carbon Output and Growth Rate in China, 2008-2021E



Source: Global and China Activated Carbon Industry Report, 2017-2021

The Chinese activated carbon market will feature the following:

I. Good prospects for activated carbon regeneration market, largely because: 1) mishandling of ineffective waste carbon will cause secondary pollution; 2) the costs of incineration and buying new carbon are far higher than that of activated carbon regeneration; 3) regenerated activated carbon produces only one-fifth of the carbon dioxide that the new activated carbon produces.

2. Market demand for coconut shell-based activated carbon continues to grow. Ever-growing environmental pollution increase the application of activated carbon in air and water purification fields. However, due to insufficient resources and stringent environmental protection, the demand for coal-based activated carbon trends down and thus provides certain space for growth in coconut shell-based activated carbon.

3. The application of activated carbon in environmental protection field will expand, typically, recovery of organic solvents, desulfurization & denitrification, adsorption & concentration and catalytic combustion of organic vapors, sewage treatment, deep purification, etc.

Global and China Activated Carbon Industry Report, 2017-2021 underlines the followings:

◆Activated carbon industry (definition, classification, sales model, industry chain, etc.);

◆Global activated carbon industry (overview, market size/structure, market size in major countries, etc.);

◆China's activated carbon industry (overview, development environment, market status, market structure, imports/exports, competitive landscape, development trends, etc.);

◆Main upstream sectors (wood cutting/processing, chemical activator, coal, etc.);

◆Main applications (water treatment, food & beverage, pharmaceuticals, automobile, chemical/metallurgy, etc.) (market size, product application, etc.);

◆Six foreign and nineteen Chinese activated carbon enterprises (operation, activated carbon business, etc.).

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