



China Coal Tar Industry Report, 2017-2021

Sep. 2017

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, one of by-products in raw coal gas generated from coal pyrolysis in coking industry, accounts for 3%-4% of the output of coal as fired and is a main raw material in coal chemical industry.

China produced 22.13 million tons of coal tar in 2016, edging up 0.1% from a year earlier, largely due to rising prices of raw materials and environmental protection campaigns. As the government intensifies crackdown on illegal polluters, coal tar output will further slip to 21.90 million tons in 2017. With phase-out of outdated capacity, the coal tar industry will gradually pick up over the next couple of years, thus stimulating coal tar output to grow again. The country's coal tar output is expected to rise at a CAGR of around 1.5% during 2017-2021.

High-temperature coal tar holds a dominant position in the Chinese market. In 2016, 16.20 million tons of high-temperature coal tar and 3.99 million tons of medium-temperature coal tar were produced, making up 73.1% and only 18.1% of total coal tar output, respectively. As high-temperature coal tar is primarily used in high value-added chemicals while medium-temperature coal tar in fuel oil field, it is expected the former will grow faster than the latter.

Around 70% of China-made coal tar is used in further processing fields. Moreover, China is a major further processor of coal tar in the world, boasting one-fourth of global coal tar deep-processing capacity in 2016. China was capable of intensively processing 24.80 million tons of coal tar in 2016, down 2.7% from 2015, mainly due to de-capacity after years of rapid expansion which caused massive over-capacity and then dramatic decline in utilization. Hence, the demand for coal tar from deep-processing fields has slowed in recent two years.

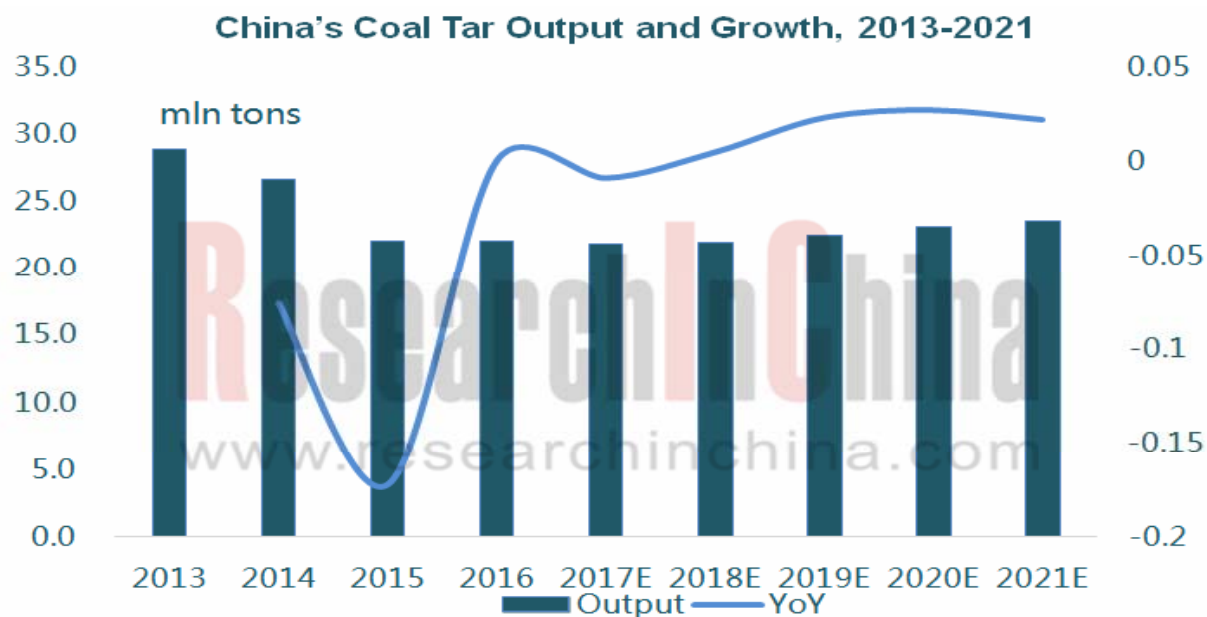
Global major coal tar deep-processing enterprises include Koppers (United States), Ruetgers (Germany), Nippon Steel & Sumikin Chemical (Japan) and Baoshun Technology (China). Koppers is the world's largest coal tar deep-processing firm with capacity of 2.10 million t/a, while Baoshun Technology is the biggest coal tar deep-processing company in China with the capacity of 1.05 million t/a. The Chinese coal tar deep-processing market features low concentration, with top10 players occupying a combined 26.2% market share in 2016.

After five years of decline amid fluctuations, coal tar price rallied in 2016 from RMB1,400/t or so at the beginning of the year to around RMB2,200/t at the end of the year at a growth rate of over 50%, and remained between RMB2,500/t and RMB3,000/t during Jan-Sept 2017. Price pick-up is mainly fueled by decreased excess capacity and a recovery in downstream market. Thanks to an upturn in coal tar pitch, industrial naphthalene and phthalic anhydride sectors, high-temperature coal tar found a higher utilization rate and steadily rising prices which, on average, were higher than that of medium and low-temperate coal tar.

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China Coal Tar Industry Report, 2017-2021 highlights the following:

- Coal tar (overview, classification, application, main manufacturing techniques, etc.);
- Chinese coal tar (high-temperature coal tar, medium-temperature coal tar) market (policy environment, supply & demand, import & export, prices, development trends, etc.);
- Upstream sectors (coal, coke) of coal tar in China (market size/structure, import & export, market prices, etc.);
- Downstream deep-processing sectors (phenol, industrial naphthalene, coal tar pitch) of coal tar in China (market size, import & export, market prices, etc.);
- Coal tar industry in China (regional/enterprise/product competitive landscape);
- Three foreign and twelve Chinese coal tar producers (operation, coal tar business, etc.)



Source: China Coal Tar Industry Report, 2017-2021 by ResearchInChina

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