

Global and China Activated Carbon Industry Report, 2018-2023

August 2018

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

Spurred by environmental campaigns, the activated carbon industry has been growing steadily in China. The global activated carbon market was worth approximately USD2.84 billion in 2017, showing a CAGR of 13.0% between 2012 and 2017, and the market size is estimated to reach USD3.22 billion in 2018 and over USD6.0 billion in 2023.

China is a big producer of activated carbon around the globe, with its production beginning to pick up along with the growing demand from downstream sectors over the recent years. In 2017, China produced about 493 kt of activated carbon (almost at the level in 2011), up 5.3% from a year earlier, and the output figure is expected to jump to 517 kt in 2018. In future, the activated carbon market will balloon further under the impetus of national policy and demand growth, and the output will maintain an AAGR of at least 5.0% during 2018-2023.

As far as segmented products are concerned, Chinese activated carbon market is led by coal-based activated carbon whose output reached 316 kt as a percentage of over 64.0% in national total output of activated carbon in 2017. Due to the supply-side reform in the coal industry and the state's policy support for the wood-based activated carbon industry, the market share of coal-based activated carbon will be squeezed progressively by wood-based activated carbon.

When it comes to prices, the price of activated carbon began to rebound in 2017. Elaborately, the price of coal-based activated carbon surged by more than 20.0% from RMB6,000/ton or so at the beginning of the year to around RMB7,300/ton at the end of the year; the price of wood-based activated carbon ascended by about 13.0%. Price hikes were largely due to demand growth and higher production costs caused by environmental protection laws.

In China, competition remains a stable pattern in the activated carbon market. The manufacturers of coal-based activated carbon mainly include Datong Coal Jinding Activated Carbon, Shanxi Xinhua Chemical, Ningxia Huahui Activated Carbon and Inner Mongolia Taixi Coal Group; in 2017, CR5 was 48.0%. Wood-based activated carbon is produced mostly by Fujian Yuanli Active Carbon, Fujian Xinsen Carbon and Fujian Zhixing Activated Carbon; in 2017, CR5 was above 50.0%.

The Chinese activated carbon market in future will be characterized as follows:

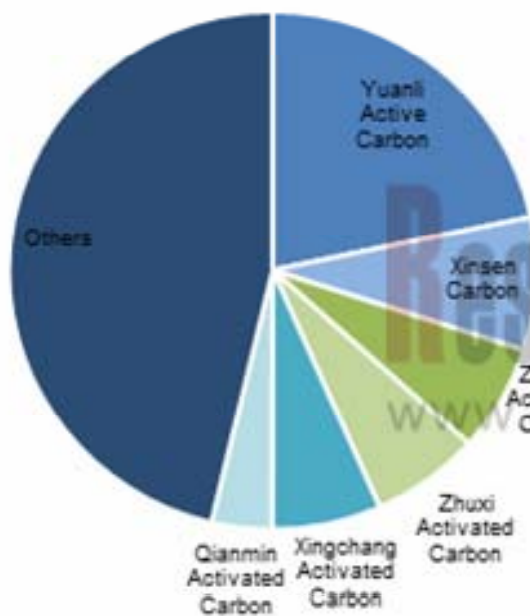
1. The activated carbon regeneration market enjoys bright prospects, largely because: 1) mishandling of ineffective waste carbon will cause secondary pollution; 2) the cost of incineration and purchasing new carbon is far higher than that of activated carbon regeneration; 3) regenerated activated carbon produces only one-fifth of the carbon dioxide that the new activated carbon does.
2. The market demand for coconut shell-based activated carbon keeps ever growing. Activated carbon has been increasingly utilized in air and water purification as environmental pollution is becoming more serious. Because of supply-side reform in coal industry and the State's stringent control on pollutants, the demand for coal-based activated carbon trends down, leaving room for the growth of coconut shell-based activated carbon.
3. Activated carbon will find wider application in environmental protection, typically used in: recovery of organic solvents, desulfurization & denitrification, adsorption & concentration and catalytic combustion of organic vapors, sewage treatment, deep purification, etc.. Also, activated carbon has been used in agriculture, such as biological activated carbon base fertilizer.

Global and China Activated Carbon Industry Report, 2018-2023 underlines the followings:

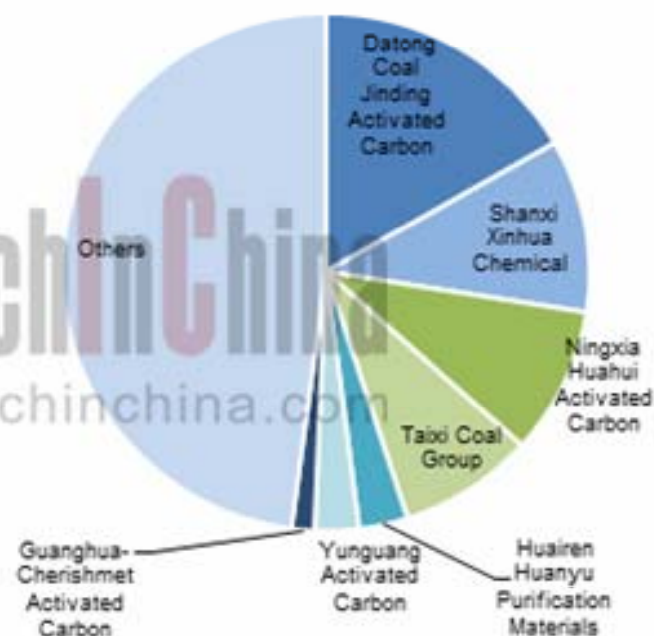
- ◆Activated carbon (definition, classification, sales model, industry chain, etc.);
- ◆Global activated carbon industry (Overview, market size and structure, market size in major countries, etc.);
- ◆China's activated carbon industry (Overview, development environment, market situation, market structure, imports & exports, competitive landscape, development trends, etc.);
- ◆Status quo of upstream sectors (wood cutting/processing, chemical activator, coal, etc.);
- ◆Size, status quo, etc. of applied markets (water treatment, food & beverage, pharmaceuticals, automobile, chemical/metallurgy, etc.);
- ◆6 foreign and 19 Chinese activated carbon enterprises (operation, activated carbon business, etc.).

Competitive Landscape of Chinese Activated Carbon Market, 2017

Wood-based Activated Carbon



Coal-based Activated Carbon



Source: Global and China Activated Carbon Industry Report, 2018-2023 by ResearchInChina

1 Overview of Activated Carbon Industry

- 1.1 Definition
- 1.2 Classification
- 1.3 Application and Sales Model
- 1.4 Industry Chain

2 Global Activated Carbon Industry

- 2.1 Overview
- 2.2 Market Size
- 2.3 Market Structure
- 2.4 Competitive Pattern
- 2.5 Major Countries/Regions
 - 2.5.1 United States
 - 2.5.2 Japan
 - 2.5.3 Russia
 - 2.5.4 Western Europe
 - 2.5.5 Asia

3 China Activated Carbon Industry

- 3.1 Overview
- 3.2 Development Environment
 - 3.2.1 Regulatory System
 - 3.2.2 Industry Policy
 - 3.2.3 Trade Policy
- 3.3 Market Size
 - 3.3.1 Output
 - 3.3.2 Patent
 - 3.3.3 Price

3.4 Market Structure

- 3.5 Import & Export
- 3.6 Competitive Pattern
 - 3.6.1 Regional
 - 3.6.2 Enterprise
- 3.7 Development Trends

- 3.7.1 Demand for Wood-based Activated Carbon Ascends
- 3.7.2 Some Uncompetitive Small Firms Will Be Forced Out of the Market
- 3.7.3 The Industry is Becoming Large and Standardized
- 3.7.4 Product Quality Gets Improved
- 3.7.5 The Activated Carbon Regeneration Market Enjoys Bright Prospects
- 3.7.6 The Market Demand for Coconut Shell-based Activated Carbon and Nut Shell-based Activated Carbon Keeps Growing
- 3.7.7 Activated Carbon Finds the Growing Application in Agricultural Production

4 Main Upstream Sectors of Activated Carbon

- 4.1 Wood Cutting & Processing Industry
 - 4.1.1 Output Value
 - 4.1.2 Output
- 4.2 Chemical Activators (Phosphoric Acid, Zinc Chloride)
- 4.3 Coal Industry
 - 4.3.1 Market Size
 - 4.3.2 Structure
 - 4.3.3 Price

4.3.4 Import & Export

5 Key Applied Markets of Activated Carbon

- 5.1 Water Treatment
 - 5.1.1 Activated Carbon Use in Water Treatment
 - 5.1.2 Status Quo of Water Treatment Industry
- 5.2 Food & Beverage
 - 5.2.1 Activated Carbon Use in Food & Beverage
 - 5.2.2 Status Quo of Food & Beverage Industry
- 5.3 Pharmaceuticals
 - 5.3.1 Activated Carbon Use in Pharmaceuticals
 - 5.3.2 Status Quo of Pharmaceuticals Industry
- 5.4 Automobile
 - 5.4.1 Activated Carbon Use in Automobiles
 - 5.4.2 Status Quo of Automobile Industry
- 5.5 Chemicals and Metallurgy

6. Leading Activated Carbon Companies Worldwide

- 6.1 Kuraray
 - 6.1.1 Profile
 - 6.1.2 Operation
 - 6.1.3 Activated Carbon Business
 - 6.1.4 Calgon
 - 6.1.5 Development in China
- 6.2 Cabot
 - 6.2.1 Profile
 - 6.2.2 Operation
 - 6.2.3 Revenue Structure

- 6.2.4 Gross Margin
- 6.2.5 Activated Carbon Business
- 6.3 WestRock
- 6.3.1 Profile
- 6.3.2 Operation
- 6.3.3 Revenue Structure
- 6.3.4 Gross Margin
- 6.3.5 Activated Carbon Business
- 6.4 Osaka Gas Chemicals Group
- 6.4.1 Profile
- 6.4.2 Osaka Gas Chemicals (OGC)
- 6.4.3 Japan EnviroChemicals (JEC)
- 6.5 CECA

7. Leading Wood-based Activated Carbon Enterprises in China


- 7.1 Fujian Yuanli Active Carbon Co., Ltd.
- 7.1.1 Profile
- 7.1.2 Operation
- 7.1.3 Revenue Structure
- 7.1.4 Gross Margin
- 7.1.5 R & D and Investment
- 7.1.6 Customers and Suppliers
- 7.1.7 Production and Sales
- 7.1.8 Activated Carbon Business
- 7.2 Fujian Xinsen Carbon Co., Ltd.
- 7.2.1 Profile

- 7.2.2 Operation
- 7.2.3 Development
- 7.3 Fujian Zhixing Activated Carbon Co., Ltd.
- 7.3.1 Profile
- 7.3.2 Operation
- 7.3.3 R & D
- 7.3.4 Main Customers
- 7.3.5 Development
- 7.4 Jiangsu Zhuxi Activated Carbon Co., Ltd.
- 7.4.1 Profile
- 7.4.2 Activated Carbon Business
- 7.5 Shanghai Xingchang Activated Carbon Co., Ltd.
- 7.5.1 Profile
- 7.5.2 Activated Carbon Business
- 7.6 Jiangsu Purestar EP Technology Co., Ltd.
- 7.6.1 Profile
- 7.6.2 Operation
- 7.6.3 Main Customers and Suppliers
- 7.7 Others
- 7.7.1 Chifeng Zhonglin Zhongtian Chemical Industry
- 7.7.2 Golden Lake Carbon
- 7.7.3 Datong Locomotive Coal
- 7.7.4 QuzhouYunhe Carbon
- 7.7.5 Hangzhou Hengxing Activated Carbon
- 7.7.6 Guizhou Qianmin Activated Carbon

8 Major Coal-based Activated Carbon Enterprises in China

- 8.1 Ningxia Huahui Activated Carbon Co., Ltd.
- 8.1.1 Profile
- 8.1.2 Operation
- 8.1.3 Activated Carbon Business
- 8.2 Datong Municipal Yunguang Activated Carbon Co., Ltd.
- 8.2.1 Profile
- 8.2.2 Activated Carbon Business
- 8.3 Shanxi Xinhua Chemical Co., Ltd.
- 8.3.1 Profile
- 8.3.2 Shanxi Xinhua Activated Carbon Co., Ltd.
- 8.3.3 Ningxia Guanghua-Cherishmet Activated Carbon Co., Ltd.
- 8.4 Inner Mongolia Taixi Coal Group Co., Ltd.
- 8.4.1 Profile
- 8.4.2 Operation
- 8.4.3 Activated Carbon Business
- 8.5 Datong Coal Jinding Activated Carbon Co., Ltd.
- 8.5.1 Profile
- 8.5.2 Activated Carbon Business
- 8.6 Others
- 8.6.1 Shanxi Huaqing Activated Carbon Group Co., Ltd.
- 8.6.2 Huairan Huanyu Purification Materials Co., Ltd.

Selected Charts

- 
- Development Course of Global Activated Carbon Industry
 - Global Demand for Activated Carbon and YoY Growth, 2010-2023E
 - Global Activated Carbon Market Size, 2012-2023E
 - Structure of Key Activated Carbon Supply Regions Worldwide (by Capacity), 2017
 - Global Activated Carbon Demand Structure by Terminal Application, 2017/2023E
 - Global Activated Carbon Application Structure, 2017
 - Global Activated Carbon Demand Structure by Product, 2017
 - Competitive Pattern of Global Activated Carbon Market, 2017
 - Demand for Activated Carbon in the United States, 2014-2023E
 - Activated Carbon Demand Structure in the United States by Application, 2017
 - Demand for Activated Carbon in Japan, 2005-2023E
 - Activated Carbon Demand Structure in Japan by Application, 2016
 - Activated Carbon Output in Russia, 2012-2023E
 - Activated Carbon Demand Structure in Western Europe by Application, 2017
 - Distribution of Main Activated Carbon Production Areas in China
 - Requirements on the Quality of Activated Carbon in Some Current National Standards in China
 - Policies on Activated Carbon Industry in China, 2003-2017
 - Revised Results of the US' Anti-dumping Investigation on China-made Activated Carbon, 2017
 - Activated Carbon Output and YoY Growth in China, 2011-2023E
 - Number of Activated Carbon Patent Filings in China, 2004-2017
 - Price Trend of Main Activated Carbons in China, 2015-2018
 - Activated Carbon Output Structure in China, 2017/2023E
 - Activated Carbon Application Structure in China, 2017/2023E
 - China's Imports of Wood-based Activated Carbon, 2010-2017
 - Top 10 Origins of China's Wood-based Activated Carbon Imports by Import Value, 2016

Selected Charts

- China's Imports of Other Activated Carbons, 2010-2017
- Top 10 Origins of China's Other Activated Carbon Imports by Import Value, 2016
- China's Exports of Wood-based Activated Carbon, 2010-2017
- Top 10 Destinations of China's Wood-based Activated Carbon Exports by Export Value, 2016
- China's Exports of Other Activated Carbons, 2010-2017
- Top 10 Destinations of China's Other Activated Carbon Exports by Export Value, 2016
- China's Coal-based Activated Carbon Export Structure by Province/Municipality, 2017
- Capacity Structure of Wood-based Activated Carbon in China (by Region), 2017
- Capacity Structure of Wood-based Activated Carbon in China (by Enterprise), 2017
- Capacity Structure of Coal-based Activated Carbon in China (by Enterprise), 2017
- Total Forestry Output Value and YoY Growth in China, 2011-2023E
- Total Forestry Output Value Structure by Region in China, 2017
- Provinces with Total Forestry Output Value of over RMB400 Billion in China, 2017
- Timber Output and YoY Growth in China, 2011-2023E
- Log Output and YoY Growth in China, 2011-2023E
- China's Log Imports, 2008-2017
- China's Main Source Countries of Coniferous Log, 2016-2017
- Price Trend of Phosphoric Acid (85% Industrial Grade) in China, 2017
- Distribution of Anthracite Reserves in China
- Anthracite Output and YoY Growth in China, 2009-2018
- Apparent Consumption of Anthracite in China, 2009-2017
- Anthracite Output Structure by Region in China, 2017
- Growth in Average Price of Anthracite in China, 2016-2017
- Price Trend of Anthracite (Middle Block) in China, 2017-2018
- China's Anthracite Imports, 2009-2017

- 
- China's Anthracite Exports, 2009-2017
 - Application History of Activated Carbon in China
 - Standards for Activated Carbon for Water Treatment in China
 - Consumption of Activated Carbon for Water Treatment in China, 2014-2023E
 - Per Capita Water Consumption and YoY Growth in China, 2009-2018
 - Bottled/Canned Drinking Water Output and YoY Growth in China, 2009-2018
 - Discharge Volume of Sanitary Sewage and Industrial Wastewater in China, 2009-2018
 - Sewage Treatment Market Size in China, 2016-2023E
 - Consumption of Activated Carbon for Food & Beverage in China, 2014-2023E
 - Demand for Activated Carbon from Fermentation Industry by Product in China, 2010-2020E
 - Starch Sugar Output and YoY Growth in China, 2009-2018
 - Sugar Output and YoY Growth in China, 2009-2018
 - Carbonated Beverage Output and YoY Growth in China, 2009-2018
 - Application of Activated Carbon in Pharmaceuticals
 - Consumption of Activated Carbon for Pharmaceuticals in China, 2014-2023E
 - CAGR of Pharmaceuticals Industry in Major Countries, 2011-2015
 - Output Value and YoY Growth of Pharmaceuticals Industry in China, 2014-2023E
 - Consumption of Activated Carbon for Automobiles in China, 2015-2023E
 - Global Automobile Output, 2012-2022E
 - Global Automobile Output Structure, 2010-2017
 - Global Automobile Output by Region, 2012-2017
 - Top 20 Countries by Automobile Output, 2017
 - Global Automobile Sales, 2012-2022E
 - Global Automobile Sales by Region, 2012-2017
 - Top 10 Countries by Automobile Sales, 2012-2017

- 
- Automobile Sales and YoY Growth in China, 2012-2022E
 - Passenger Car Sales in China, 2010-2018
 - Commercial Vehicle Sales in China, 2010-2018
 - SUV Sales Structure by Price in China, 2016-2017
 - Sedan Sales Structure by Price in China, 2016-2017
 - Top 10 Passenger Car Manufacturers by Sales in China, 2017
 - Top 10 Passenger Car Brands by Model in China, 2017
 - Passenger Car Sales Structure by Country in China, 2017
 - Kuraray's Subsidiaries
 - Main Business of Kuraray
 - Operation of Kuraray, 2016-2017
 - Revenue of Kuraray by Product, 2016-2017
 - Operation of Functional Materials Business of Kuraray, 2016-2017
 - Activated Carbon R&D and Production Bases of Kuraray
 - Main Products of Calgon
 - Calgon's Revenue and Net Income, 2010-2017
 - Calgon's Revenue (by Division), 2016-2017
 - Calgon's Gross Margin, 2011-2017
 - Calgon's Revenue in China, YoY Growth Rate and % of Total Revenue, 2010-2017
 - Global Presence of Cabot
 - Revenue and Net Income of Cabot, FY2010- FY2018
 - Revenue of Cabot (by Segment), FY2015-FY2018
 - Revenue of Cabot (by Region), FY2011-FY2017
 - Gross Margin of Cabot, FY2011-FY2018
 - Activated Carbon Revenue, YoY Growth Rate and % of Total Revenue of Cabot, FY2011- FY2017

- 
- Main Products of Cabot
 - Global Presence of WestRock
 - WestRock's Operation, FY2013-FY2017
 - WestRock's Revenue by Product, FY2015-FY2017
 - WestRock's Gross Margin, FY2014-FY2017
 - Ingevity's Revenue Structure, FY2015-FY2017
 - Equity Structure of Fujian Yuanli Active Carbon, 2018
 - Subsidiaries of Fujian Yuanli Active Carbon
 - Revenue and Net Income of Fujian Yuanli Active Carbon, 2010-2018
 - Revenue of Fujian Yuanli Active Carbon (by Region), 2010-2017
 - Gross Margin of Fujian Yuanli Active Carbon, 2010-2017
 - Gross Margin of Fujian Yuanli Active Carbon (by Region), 2010-2017
 - R & D Costs and % of Total Revenue of Fujian Yuanli Active Carbon, 2010-2017
 - Revenue of Fujian Yuanli Active Carbon from Top 5 Clients and % of Total Revenue, 2010-2017
 - Procurement of Fujian Yuanli Active Carbon from Top 5 Suppliers and % of Total Procurement, 2010-2017
 - Activated Carbon Output, Sales Volume and Inventory of Fujian Yuanli Active Carbon, 2011-2017
 - Main Products of Fujian Yuanli Active Carbon
 - Activated Carbon Applications of Fujian Xinsen Carbon
 - Equity Structure of Fujian Zhixing Activated Carbon, 2017
 - Revenue and Total Profit of Fujian Zhixing Activated Carbon, 2013-2017
 - Gross Margin of Fujian Zhixing Activated Carbon, 2013-2017
 - Total Assets and Total Liabilities of Fujian Zhixing Activated Carbon, 2013-2017
 - Revenue Structure of Fujian Zhixing Activated Carbon by Product, 2015-2017
 - Revenue Structure of Fujian Zhixing Activated Carbon by Region, 2015-2017
 - Fujian Zhixing Activated Carbon's R&D Costs and % of Total Revenue, 2015-2017

- 
- Fujian Zhixing Activated Carbon's Revenue from Main Clients and % of Total Revenue, 2017
 - 50,000 t/a Activated Carbon Deep (Fine) Processing Project Planning of Zhuxi Activated Carbon
 - Equity Structure of Jiangsu Purestar EP Technology, 2017
 - Revenue and Gross Margin of Jiangsu Purestar EP Technology, 2014-2017
 - Revenue Structure of Jiangsu Purestar EP Technology by Product, 2014-2017
 - Jiangsu Purestar EP Technology's Revenue from Top 5 Clients and % of Total Revenue, 2016-2017
 - Jiangsu Purestar EP Technology's Procurement from Top 5 Suppliers and % of Total Procurement, 2016-2017
 - Equity Structure of Ningxia Huahui Activated Carbon, 2017
 - Main Financial Indices of Ningxia Huahui Activated Carbon, 2011-2017
 - Revenue Structure of Ningxia Huahui Activated Carbon by Product, 2016-2017
 - Revenue Structure of Ningxia Huahui Activated Carbon's Activated Carbon Business by Region, 2014-2017
 - Main Overseas Activated Carbon Clients of Ningxia Huahui Activated Carbon
 - Ningxia Huahui Activated Carbon's Revenue from Top 5 Clients and % of Total Revenue, 2017
 - Main Clients of Datong Municipal Yunguang Activated Carbon
 - Main Financial Indices of Shanxi Xinhua Chemical, 2015-2017
 - Shanxi Xinhua Activated Carbon's Main Production Lines and Their Capacity
 - Revenue of Inner Mongolia Taixi Coal Group, 2010-2017
 - Production Process of Activated Carbon for Desulfurization and Denitrification of Datong Coal Jinding Activated Carbon
 - Revenue and Gross Margin of Datong Coal Jinding Activated Carbon, 2015-2017
 - Activated Carbon Output and Sales of Datong Coal Jinding Activated Carbon, 2015-2017
 - Prices of Datong Coal Jinding Activated Carbon, 2015-2017
 - Revenue and Net Income of Shanxi Huaqing Activated Carbon Group, 2013-2017
 - Revenue Structure of Shanxi Huaqing Activated Carbon Group by Region, 2015-2017
 - Shanxi Huaqing Activated Carbon Group's Revenue from Top 5 Clients and % of Total Revenue, 2016-2017
 - Shanxi Huaqing Activated Carbon Group's Procurement from Top 5 Suppliers and % of Total Procurement, 2016-2017

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