



**China Coal Tar Industry Report: Upstream  
(Coal, coke), Downstream (Phenol Oil,  
Industrial Naphthalene, Coal Tar Pitch),  
2019-2025**

Jan.2019

## **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 key product in coking sector. In 2018, China produced around 20 million tons of coal tar, a YoY drop of 2.4% largely due to a lower operating rate of coal tar producers that had to be subject to the environmental policy. Coal tar output will still edge down by an estimated 0.5% in 2019 when capacity optimization and production curtailment persist in the industry. Yet as capacity gets upgraded and demand increases, coal tar output will pick up in future, expectedly to more than 22 million tons in 2025.

Segment: of China's coal tar products, over 70% are high-temperature coal tar, a by-product from coke production. High-temperature coal tar output is predicted to approximate 16.8 million tons in 2025, compared with 15 million in 2018. Curbing production in China has brought about short supply of such product (apparent consumption ranged at 20 million tons in 2018) and a capacity utilization rate of less than 70%. Medium temperature coal tar whose output reached a mere 3.86 million tons in 2018 saw an even lower capacity utilization rate of below 30%.

Price: China's coal tar price showed a upward mobility from 2016 to 2018, hovering at RMB3,000-4,000 per ton in 2018. The price hike resulted from tight supply. There is little possibility of a drop in coal tar price in the next two years as environmental protection campaigns which started in 2018 will last to 2020, but the price will rise at a limited rate for higher price has made downstream producers unprofitable.

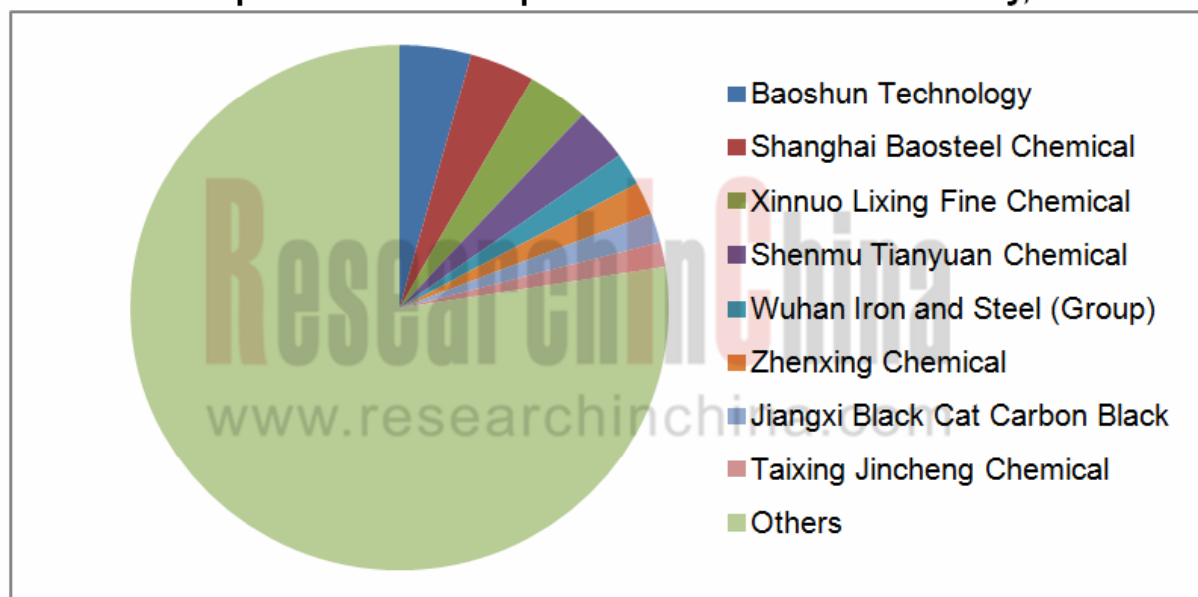
Application: over 55% coal tar is utilized in deep-processing field where most players, however, have gone into the red due to coal tar price increase, thus demanding less. The demand from deep-processing domain for coal tar stood at roughly 9.6 million tons in 2018, down 7.7% from a year earlier, but is predicted to rise a bit in 2019 as part of new deep-processing capacity becomes operational. Carbon black driven by the growing tire market in recent two years generates the rising demand for coal tar, expectedly needing more than 6 million tons in 2019.

Coal tar and deep-processing industry features low concentration and scattered capacity with CR10 being less than 30% in China. Baoshun Technology as the coal tar deep-processing enterprise boasting largest production capacity in China, seized a market share of just 4.3% in 2018. The capacity optimization of coal tar makes for a higher concentration of the industry.

The report highlights the following:

- ◆ Coal Tar (definition, classification, application, industrial chain, etc.);
- ◆ Coal Tar (development environment, market size, market structure, import & export, market price, development tendency, etc.);
- ◆ Upstream coal and coke (market size, market structure, market price, import & export, etc.);
- ◆ Downstream deep-processing market size, imports & exports, market price, etc.;
- ◆ Coal tar industry patterns by regions and competition among enterprises, etc.;
- ◆ Three foreign and twelve Chinese coal tar and deep-processing enterprises (operation, coal tar business, etc.)

## Competitive Landscape of China Coal Tar Industry, 2018



Source: ResearchInChina

**1. Overview of Coal Tar**

- 1.1 Definition & Classification
- 1.2 Preparation
- 1.3 Application
- 1.4 Key Technologies
  - 1.4.1 Coal Tar Distillation
  - 1.4.2 Industrial Naphthalene Distillation
  - 1.4.3 Elution of Fraction from Coal tar Distillation
  - 1.4.4 Refining of Crude Anthracene
  - 1.4.5 Decomposition of Hydroxybenzene Natrium Salt
  - 1.4.6 Preparation of Naphthalene
  - 1.4.7 Refining of Crude Hydroxybenzene
  - 1.4.8 Refining of Crude Pyridine and Crude Quinoline
  - 1.4.9 Production of Refined Anthracene, Refined Carbazole and Anthraquinone
- 1.5 Industry Chain

**2. Development Environment for China Coal Tar Industry**

- 2.1 Development Environment
- 2.2 Supply
  - 2.2.1 High Temperature Coal Tar
  - 2.2.2 Medium Temperature Coal Tar
  - 2.2.3 Low Temperature Coal Tar
- 2.3 Demand
  - 2.3.1 Demand from Deep Processing
  - 2.3.2 Demand from Carbon Black
  - 2.3.3 Demand from Fuel
- 2.4 Import and Export

- 2.5 Market Price
  - 2.5.1 High-temperature Coal Tar
  - 2.5.2 Medium-temperature Coal Tar
  - 2.5.3 Low-temperature Coal Tar
- 2.6 Development Trends

**3 Upstream Sectors of Coal Tar in China**

- 3.1 Coal Industry
  - 3.1.1 Market Size
  - 3.1.2 Structure
  - 3.1.3 Price
  - 3.1.4 Import & Export
- 3.2 Coke Industry
  - 3.2.1 Supply and Demand
  - 3.2.2 Import & Export
  - 3.2.3 Price

**4 Downstream Deep-processing Sectors of Coal Tar in China**

- 4.1 Phenol Oil
  - 4.1.1 Phenol
  - 4.1.2 O-cresol
  - 4.1.3 M-cresol and P-cresol
  - 4.1.4 Mixed Cresol
- 4.2 Industrial Naphthalene
  - 4.2.1 Production
  - 4.2.2 Consumption
  - 4.2.3 Import and Export
  - 4.2.4 Price

4.3 Coal Tar Pitch

4.3.1 Supply and Demand

4.3.2 Application Market

4.3.3 Price Trend

4.4 Others

4.4.1 Anthracene Oil

4.4.2 Light Oil

4.4.3 Wash Oil

#### **5. Coal Tar Industry Competition in China**

5.1 Regional Competition

5.1.1 Shanxi

5.1.2 Hebei

5.1.3 Shandong

5.2 Enterprise Competition

5.3 Product Competition

#### **6. Major Global Coal Tar Companies**

6.1 Koppers

6.1.1 Profile

6.1.2 Operation

6.1.3 Operation of Carbon Materials & Chemicals Segment

6.1.4 Business in China

6.1.5 Development Strategy

6.2 RütGERS Group

6.2.1 Profile

6.2.2 Operation

6.3 Nippon Steel & Sumikin Chemical Co. Ltd

6.3.1 Profile

6.3.2 Operation

#### **7. Major Chinese Coal Tar Companies**

7.1 Shanxi Coking Group Co., Ltd.

7.1.1 Profile

7.1.2 Operation

7.1.3 Project Investment

7.2 Shanxi Hongte Coal Chemical Industry Co., Ltd.

7.2.1 Profile

7.2.2 Capacity Expansion

7.3 Shanghai Baosteel Chemical Co., Ltd

7.3.1 Profile

7.3.2 Operation

7.3.3 Key Projects

7.4 Baoshun Technology Co., Ltd.

7.4.1 Profile

7.4.2 Operation

7.4.3 Coal Tar Business

7.5 Wuhan Iron and Steel (Group) Corp.

7.5.1 Profile

7.5.2 Operation

7.5.3 Coal Tar Business

7.6 Jiangxi Black Cat Carbon Black Inc., Ltd.

7.6.1 Profile

7.6.2 Operation

7.6.3 Coal Tar Business

7.7 Guanghui Energy Co., Ltd.

- 7.7.1 Profile
- 7.7.2 Operation
- 7.7.3 Coal Tar Business
- 7.8 Huanghua Xinnuolixing Fine Chemical Stock Company Limited
- 7.8.1 Profile
- 7.8.2 Operation
- 7.8.3 Key Projects
- 7.9 Shenmu Tianyuan Chemical Co., Ltd.
- 7.9.1 Profile
- 7.9.2 Coal Tar Business
- 7.10 JFE Zhenxing Shandong Chemical Company Ltd
- 7.10.1 Profile
- 7.10.2 Capacity
- 7.11 Shanxi Yongdong Chemistry Industry Co., Ltd.
- 7.11.1 Profile
- 7.11.2 Operation
- 7.11.3 Coal Tar Business
- 7.12 Baotailong New Materials Co., Ltd.
- 7.12.1 Profile
- 7.12.2 Operation
- 7.12.3 Coal Tar Business

- Classification of Coal Tar
- Main Products Extracted from High-temperature Coal Tar and Their Applications
- Coal Tar Industry Chain
- Development History of Chinese Coking Industry
- SWOT Analysis of Chinese Coking Industry
- Policies on Coal Chemical Industry in China
- Coal Tar Output and Growth Rate in China, 2013-2025E
- Coal Tar Output Structure in China by Product, 2018
- High Temperature Coal Tar Capacity and YoY Growth in China, 2010-2025E
- High Temperature Coal Tar Output and YoY Growth in China, 2014-2025E
- Capacity Utilization of High Temperature Coal Tar in China, 2014-2019
- High Temperature Coal Tar Production Concentrates in North China and East China.
- Main Sources of Medium Temperature Coal Tar in China, 2017
- Medium Temperature Coal Tar Output in China, 2013-2025E
- Capacity Utilization of Medium Temperature Coal Tar in China, 2015-2019E
- Capacity Structure of Medium Temperature Coal Tar (by Region) in China, 2018
- Apparent Consumption of Coal Tar in China, 2013-2025E
- High Temperature Coal Tar Demand in China, 2015-2025E
- Consumption Structure of Coal Tar in China, 2018
- Amount of Coal Tar Processed in China, 2010-2019E
- Carbon Black Output in China, 2010-2019E
- Demand from Carbon Black Industry for Coal Tar in China, 2014-2019E
- China's Coal Tar Export Tariff, 2017-2019
- China's Coal Tar Export Volume, 2007-2019E
- China's Coal Tar Import Volume, 2007-2019E



- Price Trend of Coal Tar in North China, 2009-2016
- Price Trend of Coal Tar in China, 2016-2018
- Price of High Temperature Coal Tar in China, 2014-2016
- Price of High Temperature Coal Tar in China, 2017
- Price of High Temperature Coal Tar in China, 2018
- Price of Medium Temperature Coal Tar in China, 2018-2019E
- Average Price of Low Temperature Coal Tar in China, 2016-2018
- Distribution of Anthracite Reserves in China
- Anthracite Output and YoY Change in China, 2009-2019E
- Apparent Consumption of Anthracite in China, 2009-2019E
- Anthracite Output Structure (by Region) in China, 2017
- Growth Rates for Average Price of Anthracite in China, 2016-2017
- Price Trend of Anthracite (Medium-sized) in China, 2017-2018
- China's Anthracite Imports, 2009-2018
- China's Anthracite Exports, 2009-2018
- Coke Capacity and Output in China, 2009-2019E
- China's Carbocoal Output, 2015-2019E
- Coke Output Structure in China by Province, 2018
- China's Coke Apparent Consumption, 2009-2025E
- Coke Demand Structure in China by Sector, 2018
- China's Coke Import and Export Volume, 2007-2018
- Import and Export Prices of Coke in China, 2009-2018
- Price Trend of Coke in China, 2017-2018
- Coke Price Index in China, 2017-2018
- Global Coal Tar Deep Processing Capacity Structure by Region, 2018

- China's Coal Tar Processing Capacity, 2009-2025E
- Coal Tar Deep Processing Capacity Structure in China by Region, 2018
- Capacity of Major Coal Tar Deep Processing Companies in China, 2018
- Coal Tar Deep-processing Capacity under Construction in China, 2019E
- Internationally Famous Coal Tar Deep Processing Techniques and Their Characteristics
- Coal Tar Processing Procedure in China
- Average Market Price of Major Coking Products in China, 2018
- Phenol Capacity in China, 2010-2025E
- Phenol Producers and Their Capacities in China, 2018
- Operating Rate of Phenol Installations in China, 2016-2018
- Phenol Output in China, 2017-2018
- China's Phenol Export & Import Volume, 2009-2018
- Average Import and Export Price of Phenol in China, 2009-2018
- China's O-cresol Import and Export Volume, 2009-2017
- Average Import and Export Price of O-cresol in China, 2009-2017
- Monthly Import Volume and Average Price of M-cresol in China, 2014-2018
- Monthly Export Volume and Average Price of M-cresol in China, 2014-2018
- China's Industrial Naphthalene Output, 2010-2025E
- China's Consumption Structure of Industrial Naphthalene, 2018
- China's Industrial Naphthalene Import and Export Volume, 2009-2019E
- Average Import and Export Price of Industrial Naphthalene in China, 2009-2018
- Price Trend of Industrial Naphthalene in North China, 2009-2016
- Price of Industrial Naphthalene in China, 2017-2018
- Monthly Output of Coal Tar Pitch in China, 2015-2025E
- China's Coal Tar Pitch Import and Export Volume, 2009-2019E

- Average Import Price of Coal Tar Pitch in China, 2018
- Coal Tar Pitch Demand Structure in China, 2018
- Price Trend of Modified Coal Tar Pitch in China, 2017-2018
- Price Trend of Anthracene Oil in China, 2013-2017
- Price Trend of Anthracene Oil in China, 2017
- Price Trend of Wash Oil in China, 2018
- Geographical Distribution of Coal Tar Output in China, 2013-2016
- Coke Oven Capacity Distribution in Shanxi Province
- Capacity Distribution of High Temperature Coal Coke in Shanxi Province
- Capacity Structure of High Temperature Coal Tar (by Region) in Shanxi Province, 2018
- Coal Tar Output and Growth Rate in Shanxi Province, 2012-2025E
- Capacity of Main Coal Tar Deep-processing Companies in Shanxi, 2018
- New Coal Tar Deep Processing Capacity in Shanxi Province, 2010-2020E
- Shanxi's Coal Tar Deep Processing Projects, 2018
- Development Goal of Shanxi Province's Coking Industry, 2020E
- Coal Tar Output and Growth Rate in Hebei Province, 2012-2025E
- Capacity of Main Coal Tar Deep-processing Companies in Hebei, 2018
- Coal Tar Output and Growth Rate in Shandong Province, 2012-2025E
- Capacity of Main Coal Tar Deep-processing Companies in Shandong, 2018
- Capacity of Main Coal Tar Deep-processing Companies in China, 2018
- Competitive Landscape of Chinese Coal Tar Market, 2018
- Statistics on Capacity and Products of Global Coal Tar Companies, 2018
- Presence of Koppers' Production Bases
- Carbon Materials and Chemicals of Koppers
- Net Sales and Net Income of Koppers, 2010-2018

- Net Sales Structure (%) of Koppers by Division, 2012-2018
- Net Sales Structure (%) of Koppers by Region, 2012-2017
- Application Structure of Koppers' Products, 2017
- Koppers' Coal Tar Processing Technology
- Net Sales and Operating Income of Koppers' Carbon Materials & Chemicals Division, 2010-2018
- Distribution of Production Bases of Koppers' Carbon Materials & Chemicals Division
- Revenue Structure (by Product) of Koppers' Carbon Materials & Chemicals Division, 2011-2017
- Investment Strategy of Koppers
- Development Strategy of Koppers
- Subsidiaries and Capacity of Rutgers
- Profile of Rutgers
- Net Sales and Net Income of Nippon Steel & Sumikin Chemical, FY2009-FY2017
- Major Products of Nippon Steel & Sumikin Chemical
- Revenue and Net Income of Shanxi Coking Group, 2010-2018
- Output (by Product) of Shanxi Coking Group, 2013-2017
- Sales Volume (by Product) of Shanxi Coking Group, 2013-2017
- Revenue Structure (by Product) of Shanxi Coking Group, 2012-2017
- Capacity and Capacity Utilization of Shanxi Coking Group's Main Products, 2017
- Gross Margin (by Product) of Shanxi Coking Group, 2010-2017
- Sales of Shanghai Baosteel Chemical, 2007-2018
- Development Course of Shanghai Baosteel Chemical
- Industrial Layout of Baoshun Technology
- Revenue of Henan Baoshun Technology Technology, 2011-2018
- Production Bases and Product Capacity of Henan Baoshun Chemical Technology, 2018
- Revenue and Net Income of Wuhan Iron and Steel (Group), 2010-2018

- Revenue and Net Income of Jiangxi Black Cat Carbon Black, 2010-2018
- Revenue Structure (by Product) of Jiangxi Black Cat Carbon Black, 2012-2018
- Revenue Structure (by Region) of Jiangxi Black Cat Carbon Black, 2012-2018
- Gross Margin (by Product) of Jiangxi Black Cat Carbon Black, 2010-2018
- Output and Sales Volume of Refined Coal Tar Products of Jiangxi Black Cat Carbon Black, 2015-2018
- Revenue and Net Income of Guanghui Energy, 2010-2018
- Revenue and Net Income of Huanghua Xinnuolixing Fine Chemical, 2013-2017
- Revenue Structure (by Region) of Huanghua Xinnuolixing Fine Chemical, 2013-2016
- Coal Tar Products of Shenmu Tianyuan Chemical
- Revenue and Net Income of Shanxi Yongdong Chemistry Industry, 2012-2018
- Revenue Structure (by Product) of Shanxi Yongdong Chemistry Industry, 2013-2018
- Revenue Structure (by Region) of Shanxi Yongdong Chemistry Industry, 2013-2018
- Gross Margin of Main Products of Shanxi Yongdong Chemistry Industry, 2012-2018
- Output and Sales Volume of Coal Tar Deep-processed Products of Shanxi Yongdong Chemistry Industry, 2012-2017
- Revenue and Net Income of Qitaihe Baotailong Coal & Coal Chemicals Public, 2011-2018
- Price Trend of Refined Wash Oil Produced by Baotailong New Materials, 2017
- Price Trend of Refined Wash Oil Produced by Baotailong New Materials, 2018
- Capacity of Main Products of Qitaihe Baotailong Coal & Coal Chemicals Public, 2017
- Baotailong New Materials' Revenue from Refined Wash Oil Related Business, 2015-2017

You can place your order in the following alternative ways:

1. Order online at [www.researchinchina.com](http://www.researchinchina.com)
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: [report@researchinchina.com](mailto:report@researchinchina.com)
4. Phone us at +86 10 82600828

|                 |  |     |  |
|-----------------|--|-----|--|
| <b>Party A:</b> |  |     |  |
| Name:           |  |     |  |
| Address:        |  |     |  |
| Contact Person: |  | Tel |  |
| E-mail:         |  | Fax |  |

|                 |   |        |                |
|-----------------|---|--------|----------------|
| <b>Party B:</b> |   |        |                |
| Name:           | Beijing Waterwood Technologies Co., Ltd (ResearchInChina)   |        |                |
| Address:        | Room 801, B1, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080   |        |                |
| Contact Person: | Liao Yan  | Phone: | 86-10-82600828 |
| E-mail:         | <a href="mailto:report@researchinchina.com">report@researchinchina.com</a>  | Fax:   | 86-10-82601570 |
| Bank details:   | Beneficial Name: Beijing Waterwood Technologies Co., Ltd<br>Bank Name: Bank of Communications, Beijing Branch<br>Bank Address: NO.1 jinxiyuan shijicheng, Landianchang, Haidian District, Beijing<br>Bank Account No #: 110060668012015061217<br>Routing No #: 332906<br>Bank SWIFT Code: COMMCNSHBJG |        |                |

| Title        | Format | Cost |
|--------------|--------|------|
| <i>Total</i> |        |      |

Choose type of format

- PDF (Single user license) .....3,000 USD
- Hard copy ..... 3,200 USD
- PDF (Enterprisewide license)..... 4,500 USD

※ Reports will be dispatched immediately once full payment has been received.  
Payment may be made by wire transfer or credit card via PayPal.

### About ResearchInChina

ResearchInChina ([www.researchinchina.com](http://www.researchinchina.com)) is a leading independent provider of China business intelligence. Our research is designed to meet the diverse planning and information needs of businesses, institutions, and professional investors worldwide. Our services are used in a variety of ways, including strategic planning, product and sales forecasting, risk and sensitivity management, and as investment research.

#### Our Major Activities

- *Multi-users market reports*
- *Database-RICDB*
- *Custom Research*
- *Company Search*

**RICDB** (<http://www.researchinchina.com/data/database.html>), is a visible financial data base presented by map and graph covering global and China macroeconomic data, industry data, and company data. It has included nearly 500,000 indices (based on time series), and is continuing to update and increase. The most significant feature of this base is that the vast majority of indices (about 400,000) can be displayed in map.

After purchase of our report, you will be automatically granted to enjoy 2 weeks trial service of RICDB for free.

After trial, you can decide to become our formal member or not. We will try our best to meet your demand. For more information, please find at [www.researchinchina.com](http://www.researchinchina.com)

For any problems, please contact our service team at: