



**Global and China Needle Coke Industry
Report, 2020-2026**

May 2020

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

With the merits like small resistivity, excellent resistance to impact and good anti-oxidation property, needle coke has been widely used in ultra-high power graphite electrodes, nuclear reactor deceleration materials, and lithium battery anode materials, among others. The galloping new energy vehicle and higher utilization of steel scraps serve as the stimuli to electric furnaces, facilitating the demand for needle coke whose production capacity of China soared from 160 kt/a in 2014 to 970 kt/a in 2019 and output surged from 80 kt in 2016 to 445 kt in 2019. In the forthcoming five years, the new energy vehicle industry in China and beyond will be developing rapidly and China's favorable policy about the recycling of resources helps the faster development of electric furnaces. China's output of needle coke is expected to stand at 1,384 kt in 2026, showing a CAGR of 17.6% between 2019 and 2026.

Needle Coke Output and Growth Rate in China, 2017-2026E



Needle coke falls into the coal-based type and the oil-based type, of which the former refers to the production with coal-tar pitch & fractions used as the raw materials, and the latter takes petroleum residual oil to produce needle coke. European and American producers focus on the oil-based needle coke, while Asian peers dedicate themselves to the coal-based type, particularly in China where the coal-based needle coke production has ramped up over the recent years with its capacity reporting 610 kt/a and output 250 kt in 2019, outnumbering the oil-based type's (capacity 360 kt/a and output 195 kt in 2019) for the first time in recent years.

Needle coke is largely produced in the United States, Japan and China. Phillips 66, a spin-off of ConocoPhillips, is the largest manufacturer of oil-based needle coke in the world, boasting capacities up to 370 kt/a, followed by CNPC Jinzhou Petrochemical Co., Ltd with the capacity reaching 170 kt/a as its phase-II needle coke project production kicked off in 2019. Japan-based C-Chem is the biggest producer of coal-based needle coke worldwide, possessing the capacity of 110 kt/a. Chinese producers started late, but they have made huge investments in needle coke projects successively over the recent years, and such players has seen a substantial rise in capacities as TSDR New Energy Materials Co., Ltd., Zaozhuang Zhenxing Carbon Material Technology Co., Ltd, Jinzhou Petrochemical Co., Ltd., and Kaifeng Pingmei New Carbon Material Technology Co., Ltd.

Highlights of this report:

- ◆ Needle coke (definition, classification, main models, development history, etc.);
- ◆ Global demand and supply of needle coke, technologies, competition pattern, etc.;
- ◆ Chinese needle coke industry (development environment, supply and demand, competitive landscape, import and export, etc.);
- ◆ Needle coke downstream (graphite electrode) production, demand, market pattern, etc.;
- ◆ 7 foreign and 15 Chinese needle coke manufacturers (operation, revenue structure, needle coke business, etc.)

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