

China Coal Tar Industry Report, 2014-2017



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Coal tar, a by-product of coke production, sees its output change with coke output.

During 2005-2014, with China's increased demand for steel, coke output grew at an AAGR of 8.3%, reaching 476.90 million tons in 2014, with actual amount of coal tar recycled amounting to about 15.70 million tons. Coal tar producing areas are focused on Shanxi, Hebei, Shandong, etc, of which Shanxi contributed around 18% of the country's total output in 2014.

Main consumption markets of coal tar in China are deep-processed products (including phenol, anthracene, industrial naphthalene, coal tar pitch, etc.) and carbon black, with the former accounting for roughly 75% of coal tar consumption in 2014, the year in which China's deep-processing amount of coal tar touched 11.40 million tons or so, registering a CAGR of 13.3% over the last decade.

Coal tar deep-processed products are important raw materials for pharmaceuticals, agricultural chemicals, dyes, and synthetic fibers, with strong profitability, leading to investment in coal tar deep-processing projects by a large number of companies in China in recent years. In 2014, China boasted coal tar deep-processing capacity of 24.10 million tons, concentrated mainly in North China and East China, which together occupied a proportion of more than 60%.

There are more coal tar deep-processing companies in China with fierce industrial competition. In order to promote sound development of the industry and gradually eliminate backward capacities, the Ministry of Industry and Information Technology in Mar 2014 issued Access Conditions of Coking Industry, providing that anhydrous coal tar processing capacity of single facility shall be no less than 150 kt/a. In 2014, the top3 coal tar deep-processing companies in terms of capacity were Henan Baoshun Chemical Technology Co., Ltd. (1,050 kt), Shanghai Baosteel Chemical Co., Ltd. (800 kt), and Huanghua Xinnuo Lixing Fine Chemical Co., Ltd. (600 kt).

Henan Baoshun Chemical Technology Co., Ltd. has three coal tar processing bases, namely, Henan headquarters, Shandong Baoshun, and Xinjiang Baoshun, with the first now having coal tar processing capacity of 450 kt/a after closing down 200 kt in 2013, and the latter two each 300 kt/a, which was put into operation in Nov 2011 and May 2013, respectively.

Shanghai Baosteel Chemical Co., Ltd. now has coal tar processing capacity of 800 kt/a. In addition, the company, together with Inner Mongolia Yellow River Energy Technology Group, set up Wuhai Baohua Wanchen Coal Chemical Co., Ltd, to build projects of 600 kt/a coal tar deep processing, 200 kt/a carbon black, 100 kt/a benzene hydrogenation, 50 kt/a needle coke, and 50 kt/a ultra-high power electrode. The Phase I 300 kt coal tar processing project had gone into operation in Dec. 2014.

China Coal Tar Industry Report, 2014-2017 by ResearchInChina highlights the following:

- Supply & demand, import & export, competitive landscape, price trend, and development forecast of the Chinese coal tar market;
- Supply & demand, import & export, and price trend of the Chinese coal and coke markets;
- Supply & demand, import & export, and price trend of the Chinese coal tar deep-processed products market (phenol oil, industrial naphthalene);

- Operation, coal tar business, and development forecast of 17 global and Chinese coal tar processing companies.

Table of Content

1 OVERVIEW OF COAL TAR

- 1.1 Definition and 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

2 DEVELOPMENT ENVIRONMENT FOR CHINA COAL TAR INDUSTRY

- 2.1 Policy Environment
- 2.2 Supply
- 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
 - 2.4.1 Export
 - 2.4.2 Import
 - 2.4.3 Price
- 2.5 Market Price

3 CURRENT SITUATION OF CHINA COAL AND COKE INDUSTRY

- 3.1 Coal Industry
 - 3.1.1 Output
 - 3.1.2 Import and Export
 - 3.1.3 Price
- 3.2 Coke Industry
 - 3.2.1 Supply and Demand
 - 3.2.2 Export
 - 3.2.3 Price

4 CURRENT SITUATION OF COAL TAR PROCESSING IN CHINA

- 4.1 Coal Tar Processing Capacity
 - 4.1.1 Capacity of Enterprises
 - 4.1.2 Capacity of Key Coal Tar Producing Provinces
- 4.2 Coal Tar Deep Processing Projects
 - 4.2.1 Projects under Construction and Planned, 2010-2014
 - 4.2.2 Key Coal Tar Processing Projects and Progress

4.3 Domestic and Foreign Coal Tar Processing Techniques

- 4.3.1 Foreign
- 4.3.2 Domestic

4.4 Phenol Oil

- 4.4.1 Phenol
- 4.4.2 O-cresol
- 4.4.3 M-cresol and P-cresol
- 4.4.4 Mixed Cresol

4.5 Industrial Naphthalene

- 4.5.1 Production
- 4.5.2 Consumption
- 4.5.3 Import and Export
- 4.5.4 Price Trend

4.6 Coal Tar Pitch

- 4.6.1 Supply and Demand
- 4.6.2 Application Market
- 4.6.3 Price Trend

4.7 Anthracene Oil

4.8 Light Oil

4.9 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

6.2 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

6.4 Summary

7 MAJOR CHINESE COAL TAR COMPANIES

7.1 Shanxi Coking Group Co., Ltd

- 7.1.1 Profile
- 7.1.2 Operation
- 7.1.3 Revenue Structure
- 7.1.4 Gross Margin
- 7.1.5 Project Investment
- 7.1.6 Development Prospect and Forecast

7.2 Shanxi Hongte Coal Chemical Industry Co., Ltd.

- 7.2.1 Profile
- 7.2.2 Capacity Expansion
- 7.2.3 Operation
- 7.2.4 Key Projects
- 7.3 Shanghai Baosteel Chemical Co., Ltd
 - 7.3.1 Profile
 - 7.3.2 Operation
 - 7.3.3 Key Projects
 - 7.3.4 Development
- 7.4 Henan Baoshun Chemical Technology Co., Ltd.
 - 7.4.1 Profile
 - 7.4.2 Operation
 - 7.4.3 Revenue Structure
 - 7.4.4 Gross Margin
 - 7.4.5 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 Revenue Structure
 - 7.6.4 Gross Margin
 - 7.6.5 Development Prospect and Forecast
- 7.7 Guanghai Energy Co., Ltd.
 - 7.7.1 Profile
 - 7.7.2 Operation
 - 7.7.3 Coal Tar Business
- 7.8 Jiangsu Sihuan Bioengineering Co., Ltd.
 - 7.8.1 Profile
 - 7.8.2 Operation
 - 7.8.3 Coal Tar Business
- 7.9 Huanghua Xinnuo Lixing Fine Chemical Co., Ltd.
 - 7.9.1 Profile
 - 7.9.2 Operation
 - 7.9.3 Export
 - 7.9.4 Key Projects
- 7.10 Shenmu Tianyuan Chemical Co., Ltd. of Shaanxi Coal and Chemical Industry Group
 - 7.10.1 Profile
 - 7.10.2 Operation
 - 7.10.3 Development Planning
- 7.11 JFE Zhenxing Shandong Chemical Company Ltd
 - 7.11.1 Profile
 - 7.11.2 Capacity
- 7.12 Other
 - 7.12.1 Chemical Works of Ansteel Group
 - 7.12.2 Shandong Zhenxing Coking & Chemicals Co., Ltd.
 - 7.12.3 Henan Bohai Coal Chemical Co., Ltd
- 7.13 Summary

8 SUMMARY AND FORECAST

- 8.1 Summary
- 8.2 Forecast

SELECTED CHARTS

Main Products Extracted from High-temperature Coal Tar and Their Applications
Policies on Coal Chemical Industry in China
China's Coke and Coal Tar Output, 2005-2014
Coal Tar Output Structure in China by Region, 2014
Consumption Structure of Coal Tar in China, 2013
Amount of Coal Tar Processed in China, 2005-2014
Carbon Black Output and Coal Tar Consumption in China, 2006-2014
China's Coal Tar Export Volume, 2005-2014
Export Destinations of Coal Tar from China by Export Volume, 2014
China's Coal Tar Import Volume, 2005-2014
Import Sources of Coal Tar in China by Import Volume, 2014
Average Import and Export Price of Coal Tar in China, 2010-2014
Price Trend of Coal Tar in North China, 2009-2015E
China's Raw Coal Output, 2005-2014
China's Coal Import and Export Volume, 2005-2014
Bohai-Rim Steam-Coal Price Index (Q5500K), 2010-2015E
China's Coke Output and Apparent Consumption, 2006-2014
China's Coke Import and Export Volume, 2006-2014
Price Trend of Coke in North China, 2012-2015E
China's Coal Tar Processing Capacity, 2005-2013
China's Coal Tar Projects under Construction and Planned by Region, 2010-2014
Internationally Famous Coal Tar Deep Processing Techniques and Their Characteristics
Coal Tar Processing Procedure in China
Phenol Producers and Their Capacities in China, 2014
Phenol Capacity Planed/under Construction in China, 2015
China's Phenol Export & Import Volume, 2009-2014
Average Import and Export Price of Phenol in China, 2009-2014
China's O-cresol Import and Export Volume, 2009-2014
Average Import and Export Price of O-cresol in China, 2009-2014
China's Industrial Naphthalene Output, 2005-2014
China's Consumption Structure of Industrial Naphthalene, 2014
China's Industrial Naphthalene Import and Export Volume, 2009-2014
Average Import and Export Price of Industrial Naphthalene in China, 2009-2014
Price Trend of Industrial Naphthalene in North China, 2009-2015E
China's Coal Tar Pitch Import and Export Volume, 2009-2014
Average Import and Export Price of Coal Tar Pitch in China, 2009-2014
Price Trend of Coal Tar Pitch in North China, 2012-2015E
Geographical Distribution of Coal Tar Output in China, 2013-2014
Capacity of Main Coal Tar Deep-processing Companies in Shanxi, 2014
Capacity of Main Coal Tar Deep-processing Companies in Hebei, 2014
Capacity of Main Coal Tar Deep-processing Companies in Shandong, 2014
Capacity of Main Coal Tar Deep-processing Companies in China, 2014
Carbon Materials and Chemicals of Koppers
Net Sales and Net Income of Koppers, 2010-2014
Net Sales Structure of Koppers by Segment, 2012-2014
Net Sales Structure of Koppers by Region, 2012-2014
Net Sales and Operating Income of Koppers' Carbon Materials & Chemicals Segment, 2010-2014
Revenue Breakdown of Koppers' Carbon Materials & Chemicals Segment, 2011-2013
Revenue Structure of Koppers' Carbon Materials & Chemicals Segment, 2011-2013
Subsidiaries and Capacity of Rutgers
Net Sales and Net Income of Nippon Steel & Sumikin Chemical, FY2009-FY2013
Statistics on Capacity and Products of Global Coal Tar Companies, 2014

Revenue and Net Income of Shanxi Coking Group, 2010-2014
Output Breakdown of Shanxi Coking Group by Product, 2013-2014
Sales Volume Breakdown of Shanxi Coking Group by Product, 2013-2014
Revenue Breakdown of Shanxi Coking Group by Product, 2012-2014
Revenue Structure of Shanxi Coking Group by Product, 2012-2014
Shanxi Coking Group's Sales from Main Chemicals, 2012-2013
Gross Margin of Shanxi Coking Group by Product, 2010-2014
Progress of Projects under Construction of Shanxi Coking Group by the end of Jun 2014
Revenue and Net Income of Shanxi Coking Group, 2014-2017E
Sales of Shanxi Hongte Coal Chemical Industry, 2005-2011
Major Projects of Shanxi Hongte Coal Chemical Industry, 2011-2016
Sales of Shanghai Baosteel Chemical, 2007-2013
Revenue of Henan Baoshun Chemical Technology, 2011-2014
Revenue Breakdown of Henan Baoshun Chemical Technology by Product, 2011-2014
Revenue Structure of Henan Baoshun Chemical Technology by Product, 2011-2014
Gross Margin of Henan Baoshun Chemical Technology by Product, 2011-2014
Production Bases and Product Capacity of Henan Baoshun Chemical Technology, 2014
Revenue and Net Income of Wuhan Iron and Steel (Group), 2010-2014
Revenue and Net Income of Jiangxi Black Cat Carbon Black, 2010-2014
Revenue Breakdown of Jiangxi Black Cat Carbon Black by Product, 2012-2014
Revenue Structure of Jiangxi Black Cat Carbon Black by Product, 2012-2014
Revenue Breakdown of Jiangxi Black Cat Carbon Black by Region, 2012-2014
Revenue Structure of Jiangxi Black Cat Carbon Black by Region, 2012-2014
Gross Margin of Jiangxi Black Cat Carbon Black by Product, 2010-2014
Revenue and Net Income of Jiangxi Black Cat Carbon Black, 2014-2017E
Revenue and Net Income of Guanghui Energy, 2010-2014
Revenue and Net Income of Jiangsu Sihuan Bioengineering, 2010-2014
Export Value of Huanghua Xinnuo Lixing Fine Chemical, 2009-2013
Major Projects of Huanghua Xinnuo Lixing Fine Chemical, 2004-2014
Capacity of Major Coal Tar Deep-processing Companies in China, 2014
China's Coal Tar Capacity and Deep-processing Amount, 2009-2014
China's Coal Tar Capacity, 2013-2017E
Deep-processing Amount of Coal Tar in China, 2013-2017E

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