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Global and China Activated Carbon Industry Report, 2013-2016

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Abstracts

Activated carbon as a kind of effective adsorbent finds wide application in water treatment, food & beverage, metallurgy, chemical, pharmaceutical and automotive industries.

In 2013, the capacity of activated carbon across the globe outnumbered 2 million tons/a, as opposed to the demand approximating 1.3 million tons/a, which was an indicative of severe overcapacity. Thus, a grim situation to integrate or eliminate capacities is expected to linger in the future. On a global basis, activated carbon capacity largely concentrates in a few of countries or regions including the U.S., Japan, Western Europe and China. In particular, the capacities in the United States, Japan and Western Europe are dominated by a small number of industrial players, such as America-based Calgon Carbon Corporation with activated carbon capacity over 75,000 tons/a, and Cabot Norit with the capacity of 60,000 tons/a. Others included Japan-based Osaka Gas Chemicals Co., Ltd. which was promoted to the world's third largest activated carbon producer through taking over Jacobi Carbons in October 2013. Also, Osaka Gas Chemicals has grown into the largest producer in cocoanut active charcoal market segment.

China boasts the world's largest manufacturer of activated carbon, with the estimated capacity in 2013 approximating 700,000 tons. In the market segment, China is also regarded as the largest wooden activated carbon marker in the world, where there are numerous wooden activated carbon producers, but most of them are small-scaled enterprises with annual capacity between several hundreds of tons and thousands of tons. And few can realize the capacity breaking 10,000 tons. The production bases of wooden activated carbon are mostly founded in Fujian, Jiangxi, Zhejiang, Jiangsu and other regions with abundant forest resources, and the leading manufacturers cover Fujian Yuanli Active Carbon, Xinsen Carbon, and Zhixing Activated Carbon, the

combined capacity of which claims 95,000 tons/a.

In China, the production of coaly activated carbon concentrates in the regions which abounds in coal resources including Shanxi, Ningxia and Inner Mongolia. And the top four coaly activated carbon producers in China come to Xinhua Activated Carbon, Huahui Carbon, Shenhua Ningxia Coal Industry Group and Xingtai Coal Chemical, each with the capacity above 50,000 tons/a on average.

As stringent environmental protection policies are progressively released, citing "Atmospheric Pollution Prevention Action Plan" concerning the prevention of air pollution as one example that issued by the State Council in Sep. 2013, China activated carbon industry is expected to embrace more development potentials. The estimate suggests the activated carbon output in China by 2016 will reach 751,200 tons, while the CAGR between 2013 and 2016 will be 9.7%.

The report highlights the followings:

Supply & demand, trade, relevant policies, competition pattern and development trend of global activated carbon industry;

Development environment, supply & demand, relevant policies, import & export, competition pattern and upstream industries of China activated carbon industry;

Demand forecast of China activated carbon industry breakdown (water treatment, foods & drinks, metallurgy, chemical and pharmaceuticals)

Production, operation, R&D, investment, M&A, profitability and development forecast of leading activated carbon producers all across China and beyond.

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