

Global and China Isostatic Graphite Industry Report, 2013-2016

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Abstracts

After 2006, the rapid rise of the global PV industry quickly broke the original supply and demand equilibrium of the isostatic graphite market and made the supply become increasingly tight. In this context, isostatic graphite giants in America, Japan, Europe or other countries and regions started investing heavily to expand their production capacity, easing the shortage of market supply. In 2013, with the increased support and investment in PV industry in China, the global isostatic graphite supply and supply gap widened to 1,500 tons.

China has been a hot investment spot for isostatic graphite sector and the most important consumer market of isostatic graphite in the world. In recent years, with the rapid development of Chinese photovoltaic industry, China's isostatic graphite demand is increasing year after year. In 2013, China's demand for isostatic graphite exceeded 25 kt, while output during the same period was merely less than 20 kt, the supply and demand gap being about 5 kt.

At the same time, due to the weak technical capability of domestic Chinese isostatic graphite enterprises and the technical blockage put up by foreign enterprises, the output and quality of isostatic graphite manufactured by Chinese companies have not been improved much. At present, the new Chinese entrants into isostatic graphite sector generally lack of technical reserves and have unreasonable product structure and other problems, and these problems are hard to be addressed in the short term. Therefore, in the next few years, the market supply of high-end large size and fine-structure isostatic graphite in China will remain tight.

Foreign isostatic graphite is mainly produced by Japanese TOYO TANSO, French Mersen Group and German SGL Group, all of which have production bases in China.

TOYO TANSO is the world's largest isostatic graphite manufacturer with isostatic graphite plants in Shanghai and Jiexiang County, Shandong Province. Along with the commissioning of its 4 kt/a isostatic graphite production line in Japan at the end of 2013, its total output of isostatic graphite products had reached 15 kt/a.

Mersen, the former French LCL, is the first foreign company to set up isostatic graphite production base in China. In 2012, the completion of its capacity expansion project in Chongqing made its global isostatic graphite production capacity reach 12 kt/a.

SGL Group is a multinational carbon product manufacturer from Germany. Currently it has isostatic graphite production bases in Bonn, Germany and Yangquan City, Shanxi Province, China. In July 2010, it announced to invest EUR 75 million to increase its isostatic graphite production capacity from 10 kt/a to 15 kt/a, but the project is still under construction and is expected to be put into operation at the end of 2014.

After the acquisition on Chengdu Carbon Co., Ltd, Fangda Carbon New Material Co., Ltd has become the sole Chinese company boasting mature isostatic graphite production technology. Its 20 kt/a isostatic graphite project officially began construction in 2013, and once completed, Fangda Carbon's isostatic graphite capacity will reach 24 kt/a.

'Global and China Isostatic Graphite Industry Report, 2013-2016' by ResearchInChina covers the following:

Global isostatic graphite supply and demand, competition pattern and isostatic graphite industry development situation in major countries and regions.

Isostatic graphite industry development environment in China, market supply and demand, and forecast for the next three years, competition pattern, import and export, and capacity of top 11 companies.

Downstream and upstream markets of China isostatic graphite industry.

Operations of 22 global and Chinese companies (including Toyo Tanso, Mersen, SGL and Fangda Carbon) and analysis of their isostatic graphite business.

Contents

1. OVERVIEW OF ISOSTATIC GRAPHITE

- 1.1 Profile
- 1.2 Application
- 1.3 Industry Chain

2. DEVELOPMENT STATUS OF GLOBAL ISOSTATIC GRAPHITE INDUSTRY

- 2.1 Overview of Development
- 2.2 Production
- 2.3 Demand
- 2.4 Competition Pattern
- 2.5 The United States
- 2.6 Japan
- 2.7 Germany
- 2.8 France
- Summary

3. DEVELOPMENT OF CHINA ISOSTATIC GRAPHITE INDUSTRY

- 3.1 Development Environment
 - 3.1.1 Policy Environment
 - 3.1.2 Technology Environment
- 3.2 Supply
- 3.3 Demand
 - 3.3.1 Demand Volume
 - 3.3.2 Demand Structure
- 3.4 Import & Export
- 3.5 Competition Pattern
- 3.6 Projects under Construction/Planning
- 3.7 Problems
- Summary

4. DEVELOPMENT OF DOWNSTREAM INDUSTRIES

- 4.1 PV Industry
 - 4.1.1 Development Environment

- 4.1.2 Market Size
- 4.1.3 Isostatic Graphite Demand
- 4.2 Electrical Discharge Machining (EDM) Industry
 - 4.2.1 Profile
 - 4.2.2 Isostatic Graphite Demand
- 4.3 Nuclear Power Industry
 - 4.3.1 Profile
 - 4.3.2 Isostatic Graphite Demand
- Summary

5. KEY ENTERPRISES WORLDWIDE

- 5.1 POCO
 - 5.1.1 Profile
 - 5.1.2 Isostatic Graphite Business
- 5.2 GrafTech
 - 5.2.1 Profile
 - 5.2.2 Operation
 - 5.2.3 Isostatic Graphite Business
- 5.3 Mersen
 - 5.3.1 Profile
 - 5.3.2 Operation
 - 5.3.3 Isostatic Graphite Business
- 5.4 TOYO TANSO
 - 5.4.1 Profile
 - 5.4.2 Operation
 - 5.4.3 Isostatic Graphite Business
- 5.5 Tokai Carbon
 - 5.5.1 Profile
 - 5.5.2 Operation
 - 5.5.3 Isostatic Graphite Business
- 5.6 SGL Group
 - 5.6.1 Profile
 - 5.6.2 Operation
 - 5.6.3 Isostatic Graphite Business
- 5.7 IBIDEN
 - 5.7.1 Profile
 - 5.7.2 Operation
 - 5.7.3 Isostatic Graphite Business

5.8 NTC

5.8.1 Profile

5.8.2 Isostatic Graphite Business

5.9 Carbone Lorraine

Summary

6. KEY ENTERPRISES IN CHINA

6.1 Fangda Carbon New Material Co., Ltd

6.1.1 Profile

6.1.2 Operation

6.1.3 Revenue Structure and Gross Margin

6.1.4 Isostatic Graphite Business

6.1.5 Prospects and Forecast

6.2 SINO Steel Jilin Carbon Co., Ltd.

6.2.1 Profile

6.2.2 Operation

6.2.3 Revenue Structure and Gross Margin

6.2.4 Isostatic Graphite Business

6.2.5 Prospects and Forecast

6.3 Sinosteel Shanghai Advanced Graphite Material Co., Ltd.

6.3.1 Profile

6.3.2 Isostatic Graphite Business

6.4 Mersen (Chongqing)

6.4.1 Profile

6.4.2 Isostatic Graphite Business

6.5 Pingdingshan Tianbao Carbon Co., Ltd.

6.5.1 Profile

6.5.2 Isostatic Graphite Business

6.6 Liaoning Dahua Glory Special Graphite Co., Ltd.

6.6.1 Profile

6.6.2 Isostatic Graphite Projects

6.7 Shida Carbon

6.7.1 Profile

6.7.2 Operation

6.7.2 Isostatic Graphite Business

6.8 Others

6.8.1 Hemsun High Purity Graphite Technology Co., Ltd

6.8.2 Henan Provincial Special Thermal Engineering Furnace Material Co., Ltd.

6.8.3 Baofeng Five-star Graphite Co., Ltd.

6.8.4 Hoken Carbon Techniques Co., Ltd.

6.8.5 Sichuan Qingyang New Material Technology Co., Ltd.

6.8.6 Hebei Haili Special Graphite Manufacturing Co., Ltd.

Summary

7. SUMMARY AND PREDICTION

7.1 Summary

7.2 Prediction

Selected Charts

SELECTED CHARTS

Application of Isostatic Graphite

Isostatic Graphite Industry Chain

Global Isostatic Graphite Output, 2007-2016E

Global Isostatic Graphite Demand, 2007-2016E

Global Demand for Isostatic Graphite by Field, 2013

Isostatic Graphite Output of China, 2006-2016E

Demand for Isostatic Graphite in China, 2006-2016E

Net Import Volume of Isostatic Graphite in China, 2007-2014

New and Cumulative PV Installed Capacity of China, 2009-2016E

Solar Cell Output of China, 2006-2014E

Output Value of Mould Industry in China, 2009-2015E

Demand for Isostatic Graphite for Electrical Discharge Machining in China, 2006-2015E

Revenue and Net Income of GrafTech, 2008-2016E

Revenue and Net Income of Mersen, 2008-2016E

Isostatic Graphite Capacity of Mersen, 2006-2014

Revenue and Net Income of TOYO TANSO, FY2008-FY2014

Development History of Isostatic Graphite Business of TOYO TANSO, 1974-2010

Isostatic Graphite Capacity of TOYO TANSO, 2006-2014

Revenue and Net Income of Tokai Carbon, 2008-2016E

Revenue of Tokai Carbon by Product, 2013

Isostatic Graphite Capacity of Tokai Carbon, 2006-2015E

Performance Index of Isostatic Graphite G Series of Tokai Carbon, 2014

Performance Indices of Tokai Carbon's Isostatic Graphite for Electrical Discharge Machining, 2014

Revenue and Net Income of SGL, 2008-2016E

Revenue of SGL by Product, 2013

Revenue of SGL by Region, 2013

Isostatic Graphite Capacity of SGL, 2006-2014

Revenue and Net Income of IBIDEN, FY2008-FY2013

Revenue of IBIDEN by Product, FY2013

Coverage of Isostatic Graphite Products of IBIDEN, 2012

Isostatic Graphite Capacity of IBIDEN, 2008-2014

Isostatic Graphite Capacity of NTC, 2010-2014

Revenue and Net Income of Fangda Carbon New Material, 2008-2014

Revenue of Fangda Carbon New Material by Product, 2008-2013

Gross Margin of Fangda Carbon New Material by Product, 2008-2013
Revenue and Net Income of Fangda Carbon New Material, 2012-2016E
Revenue and Net Income of SINO Steel Jilin Carbon Co., Ltd., 2008-2014
Revenue of SINO Steel Jilin Carbon Co., Ltd by Product, 2009-2013
Revenue and Net Income of SINO Steel Jilin Carbon Co., Ltd, 2012-2016E
Isostatic Graphite Capacity of Mersen (Chongqing), 2008-2014
Revenue and Net Income of Shida Carbon, 2010-2013
Performance Indices of Isostatic Graphite Products of Baofeng Five-star Graphite, 2012
Global Output and Demand of Isostatic Graphite, 2006-2013
China's Output and Demand of Isostatic Graphite, 2008-2013
Global Output and Demand of Isostatic Graphite, 2012-2016E
China's Output and Demand of Isostatic Graphite, 2012-2016E
Actual and Long-term Isostatic Graphite Capacity of Global Top 10 Enterprises, 2014
Capacity of American Isostatic Graphite Producers, 2013
Capacity of Japanese Isostatic Graphite Producers, 2013
Capacity of German Isostatic Graphite Producers, 2013
Output and Demand of Isostatic Graphite Worldwide, 2007-2016E
Policies on Isostatic Graphite Industry in China, 2006-2013
Demand for Isostatic Graphite in China by Field, 2006-2014
Capacity and Maximum Specification of Top 10 Isostatic Graphite Enterprises in China, 2014
Parameters of Isostatic Pressing Machines of Isostatic Graphite Manufacturers in China, 2012
Isostatic Graphite Projects under Planning/Construction in China, 2012- 2014
Performance Comparison between Isostatic Graphite Products Made by Chinese and Foreign Enterprises, 2013
Isostatic Graphite Industry in China and Foreign Countries
Output and Demand of Isostatic Graphite in China, 2007-2016E
Crystalline Silicon Cell Output and Isostatic Graphite Demand in China, 2011-2014E
Demand for Isostatic Graphite in China, 2012-2020
Demand for Isostatic Graphite in PV, Electrical Discharge Machining and Nuclear Power Industries in China, 2006-2013
Performance Indices of POCO's Isostatic Graphite for Electrical Discharge Machining, 2012
Performance Indices of Isostatic Graphite Products of GrafTech, 2014
Revenue of Mersen by Product/Region, 2012-2013
Isostatic Graphite Production and Processing Institutions Affiliated to TOYO TANSO
Main Parameters of Isostatic Graphite of Toyo Tanso
Capacity of Global Leading Isostatic Graphite Manufacturers, 2014

Isostatic Graphite Projects of Fangda Carbon, 2011-2013
Capacity and Output of Isostatic Graphite of Chengdu Carbon, 2008-2013
Performance Indices and Application of Isostatic Graphite Products of Chengdu Carbon, 2013
Isostatic Graphite Products Specifications of Chengdu Carbon, 2013
Gross Margin of SINO Steel Jilin Carbon by Product, 2008-2013
Isostatic Graphite Project of Sinosteel Shanghai Advanced Graphite Material, 2013
Isostatic Graphite Project of Mersen (Chongqing), 2004-2011
Performance Indices of Isostatic Graphite Products of Pingdingshan Tianbao Carbon, 2014
Isostatic Graphite Projects of Liaoning Dahua Glory Special Graphite, 2011-2012
Capacity of Subordinated Enterprises of Shida Carbon, 2014
Isostatic Graphite Projects of Shida Carbon, 2010-2011
Isostatic Graphite Projects of Hemsun High Purity Graphite Technology, 2011-2014
Performance Indices of Isostatic Graphite Products of Hemsun High Purity Graphite Technology, 2014
Performance Indices of Isostatic Graphite Products of Henan Provincial Special Thermal Engineering Furnace Material, 2014
Specifications of Isostatic Graphite Products of Henan Provincial Special Thermal Engineering Furnace Material, 2014
Isostatic Graphite Capacity of China, 2013

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