

# Research Report on China Coke Industry 2010-2019

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## Abstracts

### Description

Coke is widely used as reductant and fuel in blast furnace ironmaking, cupola ironmaking, ferroalloy smelting and non-ferrous metal smelting as well as in calcium carbide production, gasification and synthetic chemistry as raw material. According to the statistics, over 90% of coke in the world is used in blast furnace ironmaking, which is of strategic value and economic significance.

Currently, coke production in China could be classified into commercial machine-made coke manufacturer and coke manufacturers of large steel enterprises. However, as the latter mainly serve their parent companies, only coke from the former can be seen in the market.

Coking industry underwent rapid development during the period of 2011-2013 with a big rise in coke production. By the end of 2014, coking industry has reported excess capacity of 680 million tons, among which only 70% were utilized. In 2014, 711.60 million tons of cast iron, 823 million tons of crude steel (half of the total production in the world) and 1.126 billion tons of steel were produced, all reporting a decreasing growth rate. And coke production in 2014 was 477 million tons, increasing 0.1% year on year. Therefore, it is clear that the changes of steel industry directly influence the trend of coke production.

With regard to the distribution of coke production, coking enterprises mainly concentrate in North China, East China and Northeast China, among which Shanxi reported an output of 87.2225 million tons in 2014, an 18.29% of the sum. Although Shanxi remained the largest producer, its proportion to the national sum has kept decreasing. Other important production areas are Hebei, Shandong, Henan and Inner Mongolia.

As China has abolished coke export quota and a tariff of 40% since 2013, coke export market has undergone rapid development. But as the annual export volume of coke reached 14 million tons during the period of 2002 when China entered WTO to 2008, the export increase in 2013-2014 was just a recovery from financial crisis. As the export cost of coke decreases and its competitiveness in global market improves as a result of the relieved export tariff and quota, more and more countries has begun to consider importing coke from China. In 2014, 8.507 million tons of coke with a year-on-year increase of 82.1% was exported from China, about 90% of which i.e. 7.636 million with a year-on-year growth of 92.1% came from Shanxi. And India, Japan and Mexico are the major export destinations. In 2014, 62.36 million tons of coking coal with a year-on-year decrease of 17.28% were imported into China while 61.56 million tons with a year-on-year decrease of 17.12% more than its export. And China has been net importer of coking coal for 11 years on end. In 2014, Australia remained the largest exporter of coking coal, reporting an export of 31.20 million tons which accounted for 50.03% of China's total import and increased 3.49% year on year. While Mongolia ranked second with an export of 14.79 million tons, decreasing 4.24% year on year.

Driven by fixed asset investment in infrastructure, Chinese GDP is expected to maintain a growth rate of over 6%. With the increasing fixed asset investment, metallurgy and construction machine manufacturing is bound to develop, leading to the development of coke industry indirectly.

Readers can get at least the following information through this report:

policy and economic environment facing coke industry in China

supply and demand of coke industry in China

import and export of coke

key enterprises of coke industry in China

development trend of coke industry in China

The author suggests the following groups of people purchase this report:

coke manufacturers

enterprises engaged in coke trade

steel producers

investors/research institutions interested in coke industry in China

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Shandong Tiexiong Coking Co., Ltd; Ansteel; Shanghai Coking Co., Ltd; Shanxi Sunlight Coking Group Co., Ltd; Shanxi Coking Group Co., Ltd; Shanxi Lubao Group; Shanxi Jinye Coking Group Company; Risun; Jingdezhen Coking Industry Group Co., Ltd; Taiyuan Coal Gasification (Group) Co., Ltd

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