China Coal Tar Industry Report, 2016-2020

Description:

Coal tar is a by-product of coke production, and its output varies with coke output.

In 2007-2014, China's coke output continued to grow, but the growth rate had been declining since 2010. In 2015, due to a downturn in the steel industry, the coke demand shrank sharply, with the output sliding 6.7% year on year. The change in coal tar output was basically the same as that of coke. In 2015, the coal tar output in China approximated 17.7 million tons.

In 2015, China's coal tar production converged in North China and East China, which contributed an aggregate of 57% of the total nationwide. By province, Shanxi, Hebei and Shandong ranked among the top three in terms of coal tar output. Among them, Shanxi constituted China's largest coal and coke producing area, whose coal tar output occupied 17.9%.

In China, coal tar is mainly consumed in deep-processed products (including phenol, anthracene, industrial naphthalene, coal tar pitch, etc.) and carbon black, with 2015's consumption in the two markets accounting for 76% and 22%, respectively.

In 2015, China's coal tar processing capacity totaled 25.5 million tons, and there were a large number of coal tar deep-processing enterprises that went into fierce competition. To promote sound development of the industry and by degrees eliminate backward capacity, the Ministry of Industry and Information Technology (MIIT) issued in 2014 the Access Conditions of Coking Industry, which stipulates that anhydrous coal tar processing capacity of single facility shall be no less than 150 kt/a. It is expected that in the upcoming years China's coal tar processing capacity will slow down, and that capacity concentration will improve.

The Chinese coal tar processing enterprises mainly include Henan Baoshun Chemical Technology, Shanghai Baosteel Chemical, and Huanghua Xinnuo Lixing Fine Chemical, whose capacity reached respectively 1.05 million tons, 950,000 tons, and 900,000 tons in 2015. Among them, Baoshun Chemical has three major coal tar bases-Henan headquarters, Shandong Baoshun, and Xinjiang Baoshun, which have the processing capacity of 450,000 t/a, 300,000 t/a, and 300,000 t/a, respectively.

In 2015, affected by a combination of factors including China's economic slowdown, a fall in international crude oil prices, weakened demand for downstream products of coal tar, as well as the enforcement of the most stringent environmental protection law, coal tar prices bottomed out. In 2016-2020, China's coal tar industry will still face pressure from environmental protection rectification and excessive industrial capacity reduction. However, with the elimination of backward capacity and the improvement of capacity concentration, we project that in 2017 the coal tar prices will pick up, and that by 2020 China's coal tar output will reach about 20 million tons.

The report, "China Coal Tar Industry Report, 2016-2020" is mainly concerned with 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, etc.);
- Operation, coal tar business, and development forecast of 15 global and Chinese coal tar processing companies

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