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# World Activated Carbon

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Industry Study with Forecasts for **2012 & 2017**

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Study #2363 | May 2008 | \$5700 | 364 pages

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*Water treatment will remain the largest activated carbon application, although other uses such as power plant flue gas treatment and motor vehicle emission canisters will grow faster.*

## Global demand to expand 5.2% yearly through 2012

World demand for virgin activated carbon is forecast to expand 5.2 percent per year through 2012 to 1.15 million metric tons. The US, China and Japan will together continue to account for almost half of global demand in 2012, although China will expand its market share from 15 percent to 18 percent while the US and Japan will see a reduction in their respective market shares. Western Europe will also remain an important albeit slow growing market. Activated carbon demand will benefit from a continuing intensification of the global environmental movement as well as rapid industrialization in much of the developing world. Changes in government regulation and enforcement will significantly impact demand in environmentally driven applications.

## Granular activated carbon to outpace powdered

Powdered activated carbon (PAC), which has historically accounted for the largest share of overall activated carbon demand (due to its dominance in liquid phase applications and its lower cost), will register slower gains than granular activated carbon (GAC) through 2012. The main advantage of GAC is its ability to be regenerated, which is especially important in Western Europe. Although faster growth in granular activated carbon demand will benefit the regeneration sector, this will be offset to some



extent by cheaper imports from China and other Asian countries that will reduce the economic incentive to regenerate.

## Water treatment to remain largest application

Water treatment applications will continue to account for the largest share of global activated carbon demand in 2012, although gains of 4.5 percent per year in this sector will lag all other key markets. Besides the necessity for clean drinking water, government environmental regulations that vary by region (such as the US Disinfection Byproducts Rule that was promulgated in 2006) also impact this market significantly.

## Environmental uses to be fastest growing

Other environmental applications for activated carbon with strong growth potential include flue gas treatment from power plants in the air pollution control arena and hazardous waste remediation. In developing countries, emission canister control regulations for motor vehicles will also bolster activated carbon demand in a similar manner to that experienced by most developed countries over the 2002-2007 period. Demand in the food and beverage sector will be aided by rapidly rising per capita food and beverage (and therefore sweetener) consumption in developing countries.

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## Sample Text, Table & Chart

### ASIA/PACIFIC

#### South Korea: Markets

Demand for activated carbon in South Korea is forecast to reach 1.2 million metric tons in 2012. The largest application is water treatment. Gas phase applications are expected to grow through 2012, and become almost equal to liquid phase applications. The largest outlet for activated carbon is air purification, such as the removal of sulfur oxides and nitrogen oxides from power plant and industrial boiler flue gases. Demetals processing and chemicals purification is also significant. Recovery uses are relatively small.

The most significant air pollution problem in South Korea is the release of particulate matter, largely the result of the widespread use of coal as a fuel. Sulfur oxides, nitrogen oxides and volatile organic compounds are also problematic. Generally, the air quality in South Korea deteriorated markedly from the 1960s through the early 1990s as a result of the rapidly increasing industrialization of the country. The steep growth in the number of motor vehicles in use has also contributed to the problem, as has the migration of polluted air from China. In 2003, the South Korean government instituted the Blue Sky 21 program, which is designed to improve air quality via stricter automobile emissions standards, a cap-and-trade program for power plants, and requirements to add emissions control systems to new power plants. Demand for activated carbon in air pollution markets is forecast to advance through 2012, and become almost equal to liquid phase applications.

Demand for activated carbon in air pollution markets is forecast to advance through 2012, and become almost equal to liquid phase applications.

221

TABLE VII-21

### SOUTH KOREA -- ACTIVATED CARBON DEMAND BY APPLICATION & MARKET (000 metric tons)

Item	1997	2002	2007	2012	2017
Gross Domestic Product (bil 2006\$)					
metric tons AC/bil \$ GDP					
Activated Carbon Demand					
By Application:					
Liquid Phase					
Gas Phase					
By Market:					
Water Treatment					
Drinking Water					
Other Water Treatment					
Foods & Beverages					
Sweetener Processing					
Other Foods & Beverages					
Industrial					
Air Purification					
Solvent Recovery					
Other Industrial Uses					
Motor Vehicle					
Pharmaceutical & Medical					
Other Markets					

SAMPLE TABLE

CHART IX-1

### WORLD ACTIVATED CARBON MARKET SHARE BY COMPANY, 2007 (\$1.1 billion)

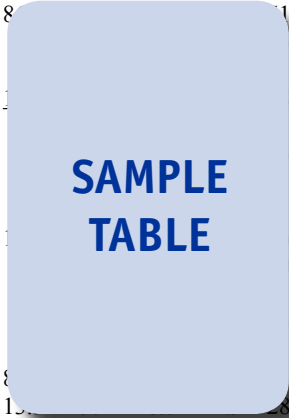


SAMPLE CHART

## Sample Profile, Table & Forecast

**TABLE VII-20**  
**SOUTH KOREA -- ACTIVATED CARBON SUPPLY & DEMAND**  
 (000 metric tons)

Item	1997	2002	2007	2012	2017
Asia/Pacific AC Demand	18				1.4
% South Korea					9
Activated Carbon Demand					3
Powdered					6
Granular					1
Other Products					6
- imports					0
+ exports					9
Activated Carbon Production					2
Imports as Percent of Demand	8				0
Exports as Percent of Production	15				8.1



**COMPANY PROFILES**

**Donau Chemie AG**  
 Am Heumarkt Ten  
 1030 Wien  
 Austria  
 43-1-711-470  
<http://www.donauchemie.at>

Sales: \$ (Company)  
 Employ: (Company)

Key Products: white- and wood-based activated carbon purification services

Donau Chemie is a producer of fine and specialty activated carbon through three divisions: Donau Carbon, Donau Carbon and Donau Carbon.

The Company is active in the world activated carbon industry through the Donau Carbon division, which operates as the Donau Carbon GmbH & Company KG subsidiary (Germany). Among other products, Donau Carbon produces and markets powdered, granular and extruded varieties of coal-, lignite-, wood- and coconut shell-based activated carbon products. The company is also working to develop activated carbons from new raw materials. Donau Carbon activates carbon through the use of steam, zinc chloride and phosphoric acid. In addition to the provision of activated carbon, it also offers impregnation, analysis, reactivation and disposal services to its customers.

Donau Carbon's products are sold under such brand names as HYDRAFFIN, DESOREX, SUPERSORBON, OXORBON, CARBOPAL, EPIBON, ALCARBON, CONTARBON, KOMBISORB and

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"The food and beverage market for activated carbon in South Korea is relatively small, primarily because South Korea is a comparatively small producer of sugar and other sweeteners. Other food and beverage uses include edible oils, juices and alcoholic beverages. Overall demand for activated carbon in food and beverage markets in South Korea is forecast to reach 2,600 metric tons in 2012."

--Section VII, pg. 223

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Demand for filters in China will jump 14.4% annually through 2011. Air filters will post the fastest gains, spurred by rising output of products that include filters or are made in clean-air factories. The motor vehicle market will remain dominant while the water and waste treatment segment of the utilities and consumer markets grows the fastest. This study analyzes the ¥20.9 billion Chinese filter industry, with forecasts for 2011 and 2016 by product and market. It also evaluates company market share and profiles major players

#2310.....05/2008..... \$5100

**Water Treatment in China**

Demand for water treatment products in China will soar 15.5% annually through 2012. Filters and membranes will be the fastest growing segments, although all types will see double-digit gains. The industrial sector will remain the largest market, but will be outpaced by municipal and other end uses. The study analyzes the ¥20.4 billion water treatment product industry in China, with forecasts for 2012 and 2017 by product, market and region. It also evaluates company market share and profiles leading industry players.

#2329.....04/2008..... \$5100

**World Filters**

Global filter demand will climb 5.6% annually through 2011. Developing areas will lead gains based on faster-growing economies and the enactment of stricter environmental laws. China, India and Russia will post some of the strongest sales growth. Air and fluid filters will be the fastest growing types. This study analyzes the \$37 billion world filter industry, with forecasts for 2011 and 2016 by product, market, world region and for 26 countries. It also evaluates company market share and profiles major players.

#2295.....03/2008..... \$5800

**World Water Treatment Products**

Global demand for water treatment products will grow 6.4% annually through 2011. Advances will be the fastest in the developing world, especially China and India. Gains in more established markets will be driven by technology upgrades such as higher-end membranes in desalination and other uses. This study analyzes the \$29.3 billion world water treatment product industry, with forecasts for 2011 and 2016 by product, market, world region and 20 countries. It also details market share and profiles major players.

#2276.....01/2008..... \$5800

**World Carbon Black**

World carbon black demand is forecast to rise 4.2% per year through 2011, bolstered by a healthy global rubber market. Special blacks will be the fastest growing market. The Asia/Pacific region, excluding Japan, will post the strongest gains. This study analyzes the 8.9 million metric ton world carbon black industry, with historical data and forecasts for 2011 and 2016 presented by product, market, world region and for 26 countries. The study also evaluates company market share and profiles leading producers.

#2186.....05/2007..... \$5400

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