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World Activated Carbon

Industry Study with Forecasts for **2014 & 2019**

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767 Beta Drive
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Toll Free US Tel: 800.927.5900 or +1 440.684.9600
Fax: +1 440.646.0484
E-mail: info@freedoniagroup.com

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The US market will pace global growth based on new mandates for mercury removal at coal-fired power plants and mercury emissions control at cement kilns and industrial boilers.

Global demand to expand 9.9% yearly through 2014

World demand for virgin activated carbon is forecast to expand an impressive 9.9 percent per year through 2014 to 1.7 million metric tons. The US represents the largest national market for activated carbon in the world, and through 2014 the country will also pace global growth. Demand in the US will rise over 15 percent per year through 2014. This optimistic outlook is based on anticipated new federal environmental regulations mandating mercury removal at coal-fired power plants. These federal regulations, classified under maximum achievable control technology (MACT) standards, are likely to pass by 2011 and take effect by 2014. However, a number of states have already passed their own regulations, resulting in US activated carbon demand from coal-fired power plants rising significantly in 2009. Once the federal regulations take effect, sales of powdered activated carbon are expected to really take off in 2013 and 2014.

Demand in the US will also be aided by regulations that require mercury emissions control at cement kilns and at industrial boilers. Total new annual demand due to these two applications will be about 60,000 metric tons. US activated carbon demand from the water sector will benefit from the US Environmental Protection Agency's Stage 2 Disinfection Byproduct (DBP) Rule. This rule was promulgated in 2006 and establishes maximum levels at which DBPs are permitted to be present in drinking water supplies. DBPs are potentially harmful compounds formed when chlorine used to disinfect drinking water reacts with naturally occurring organic materials in the water. By removing the organic materials, activated carbon prevents DBP formation.

Gains in China to be driven by economic growth

Unlike in the US, where federal regulations will dictate the bulk of new demand growth, strong gains of around ten percent per year in China's market for activated carbon will result from continuing healthy economic growth in the country. All end uses for activated carbon in China will benefit from this economic growth. Although the country relies on coal to supply a majority of its energy requirements, US-type mercury removal regulations are unlikely to pass in China in the near future. Demand for activated carbon in Western Europe and Japan will register weak gains through 2014. However, in Western Europe there is a chance that coal will make a comeback as a key energy source. If new coal-fired power plants proliferate in Western Europe in the future, they are likely to also use activated carbon injection systems to curtail mercury emissions.

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Sample Text, Table & Chart

TABLE VII-5

AUSTRALIA -- ACTIVATED CARBON SUPPLY & DEMAND (000 metric tons)

Item	1999	2004	2009	2014	2019
Asia/Pacific Activated Carbon Demand					
% Australia					
Activated Carbon Demand					
Powdered					
Granular					
Other Products					
- imports					
+ exports					
Activated Carbon Production					
Imports as a Percent of Demand					
Exports as a Percent of Production					

SAMPLE TABLE

ASIA/PACIFIC

Australia: Supply & Demand

Demand for activated carbon in Australia is forecast to ... metric tons. Au... n in recent years ... tons in 2009 an... re nevertheless s... he Philippines, S... Thailand and Indonesia. Some higher-priced material is also ... primarily from Japan and the US.

SAMPLE TEXT

A number of small scale activated carbon producers we... in Australia in the early years of the 21st century, but most ha... ceased operations. At present, there are only two significant ... in the country: locally based mineral sands producers Tiwest and Iluka. Tiwest produced close to 10,000 metric tons of activated carbon in 2009, while Iluka produced over 3,000 metric tons in the same year. Western Power (Australia) successfully produced activated carbon and eucalyptus oil from mallee eucalyptus trees in an experiment in Narrogin in western Australia in 2006, but no further production seems to have occurred thereafter. A number of local coal producers were successful at making activated carbon from coal in western Australia over the past decade, but this never translated into any significant production on a regular basis.

Activated Carbon Technologies (Australia) buys unfinis... activated carbon and screens and mills this into powdered an... products. The company operates a plant in Perth that opened ... and can produce up to 12,000 metric tons of primarily coal-b... ished activated carbon per year, although actual production i... less than 5,000 metric tons. Seventy percent of the company... activated carbon raw material is sourced locally (primarily fr... with 20 percent coming from China and 10 percent from the ...

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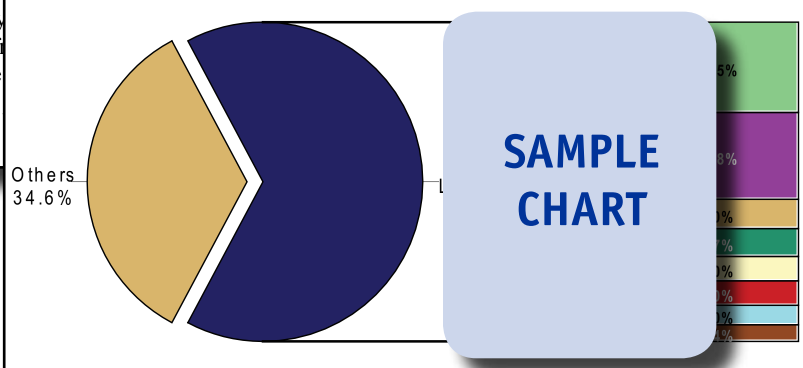
CHART IX-1

WORLD ACTIVATED CARBON MARKET SHARE BY COMPANY ($1.5 billion, 2009)



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Sample Profile, Table & Forecast

TABLE VII-6

AUSTRALIA -- ACTIVATED CARBON DEMAND BY APPLICATION & MARKET (000 metric tons)

Item	1999	2004	2009	2014	2019
Gross Domestic Product (bil 2008 US$)					055
metric tons AC/bil $ GDP					.3
Activated Carbon Demand					.0
By Application:					
Liquid Phase					.2
Gas Phase					.8
By Market:					
Industrial					.8
Air Purification					.5
Other Industrial Uses					.3
Water Treatment					.1
Drinking Water					.1
Other Water Treatment					.0
Food & Beverage					.6
Sweetener Processing					.9
Other Food & Beverage					.7
Motor Vehicle					.4
Pharmaceutical & Medical					.3
Other Markets					0.8

SAMPLE TABLE

COMPANY PROFILES

Desotec Activated Carbon NV-SA
Regenbeekstraat, 44
8800 Roeselare
Belgium
32-5124
http://wv

Annual S
Employ

Key Pro ... owdere
carbon; a ... services

SAMPLE PROFILE

Desotec Activated Carbon is a producer of activated carbon for purification applications. The Company is privately held.

The Company is involved in the world activated carbon industry through the production, delivery, return and reactivation of activated carbon, as well as through the design, sale and rental of activated carbon-based filters. Activated carbon from Desotec is produced in granular, pelletized and powdered forms and based on coal, coconut shells and wood.

Coal-based activated carbon from the Company includes granular, pelletized and powdered types sold under the ORGANOSORB, OXYSORB, AIRPEL and PARADIOX brand names. Specific products include ORGANOSORB 10 standard coal-based granular activated carbon for water treatment applications; ORGANOSORB 11 standard acid-washed, coal-based granular activated carbon for liquid purification applications; AIRPEL 10 pelletized activated carbon, which is designed for use in volatile organic compound treatment and other gas applications; ORGANOSORB 100 R powdered reactivated carbon for

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"Demand for activated carbon in Australia is forecast to exceed 11,000 metric tons in 2014. In Australia, gold mining is a major outlet for activated carbon use (classified under other industrial uses in this study) since the country is essentially tied with the US as the world's third largest producer of gold, behind China and South Africa."
--Section VII, pg. 184-5

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Other Studies

World Industrial Gases

Global demand for industrial gases will increase 8% yearly to 2014. The Asia/Pacific region will remain the fastest growing based on its ever expanding manufacturing base. The Africa/Mideast region will also exceed average growth rates, driven in part by its large oil reserves and refining industry. This study analyzes the $35.7 billion world industrial gas industry, with forecasts for 2014 and 2019 by market, type, world region and for 27 countries. It also evaluates company market share and profiles industry participants.

#2659 .... August 2010 .... $5900

World Specialty Silicas

World specialty silicas demand will rise 6.3% yearly through 2014, driven by growth in key silica markets such as tires, rubber, chemicals and agricultural products. Precipitated silica will remain the dominant product type and lead gains. The Asia/Pacific region will grow at the fastest pace. This study analyzes the 2 million metric ton world specialty silica industry, with forecasts for 2014 and 2019 by product, market, world region and for 14 countries. It also evaluates company market share and profiles industry participants.

#2644 ....June 2010 .... $5800

World Salt

Global salt demand will rise 2.6% yearly through 2013. Growth in developing countries will more than offset an expected contraction of salt demand in developed economies. The large chemical manufacturing market will generate most new demand, due to rapid growth in Chinese chemical production. This study analyzes the $9.7 billion world salt industry, with forecasts for 2013 and 2018 by salt market, production method, world region and for 20 countries. It also evaluates company market share and profiles industry participants.

#2597 .... March 2010................... $5700

World Carbon Black

World demand for carbon black is forecast to rise 4.3% annually through 2013. Growth in the non-tire rubber product market will outpace growth in the dominant motor vehicle tire sector, while the smaller special blacks market will rise the fastest. The Asia/Pacific region will post the strongest gains. This study analyzes the 9.4 million metric ton world carbon black industry, with forecasts for 2013 and 2018 by market, world region and for 25 countries. It also evaluates company market share and profiles industry players.

#2596 .... February 2010................. $5700

World Filters

Global demand for filters is forecast to expand 5.1% annually through 2013. Market advances in the developing areas will considerably outpace increases in the US, Western Europe and Japan. Sales of air purification filters will be the fastest growing segment while internal combustion engine and related filters remain the largest. This study analyzes the $45.5 billion world filter industry, with forecasts for 2013 and 2018 by product, market, world region and for 26 countries. It also evaluates market share and profiles industry players.

#2568 .... November 2009................ $6100

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