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World Activated Carbon

Industry Study with Forecasts for **2016 & 2021**

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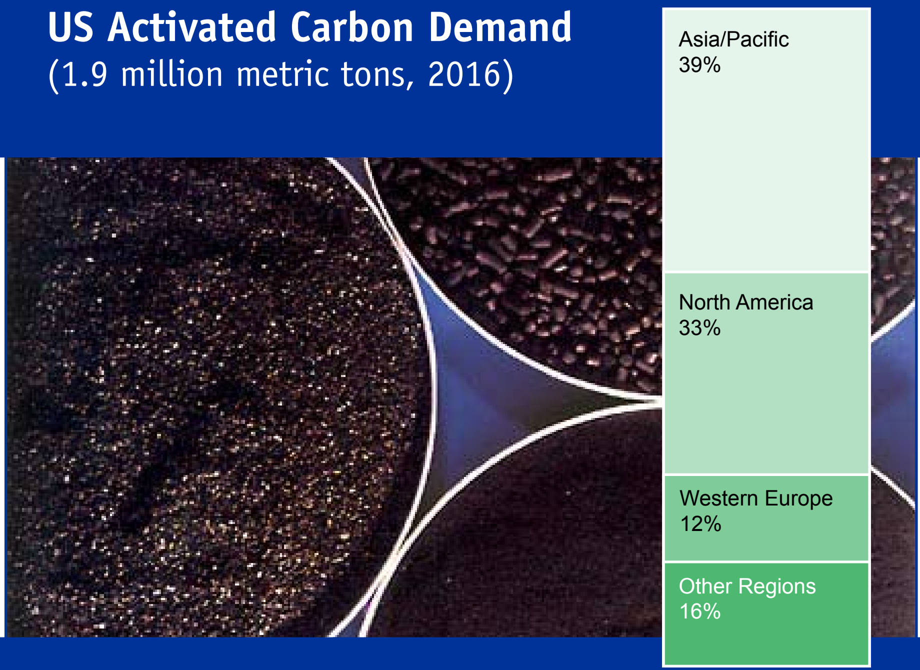
Gains will be driven by more stringent pollution controls in the US and China, and expanding production of edible oils, beverages, and sweeteners in much of the rest of the world.

World demand to advance 10.3% yearly through 2016

World demand for activated carbon is expected to increase more than ten percent per year through 2016 to 1.9 million metric tons. This high rate of growth will be attributable to a number of factors, though regulatory changes in the US will be the largest single driver. China's activated carbon market will also rise rapidly as the country's Twelfth Five-Year Plan (2011-2015) seeks to improve water and air quality in the nation. Expanding production of edible oils, beverages, and sweeteners will stimulate growth in much of the rest of the world, but overall demand will rise more slowly than in the US and China.

US Activated Carbon Demand
(1.9 million metric tons, 2016)



New rules to spur world-leading gains in US demand

The US Environmental Protection Agency (EPA) placed into force new Mercury and Air Toxics Standards (MATS) in 2011. These rules require drastic reductions in mercury emitted from coal-fired power plants, industrial boilers, and portland cement kilns, among other sources. Activated carbon is widely accepted to be the most economical and effective method for controlling these emissions, and enormous amounts of activated carbon will be needed to do so. Further regulatory changes, such as the implementation of the EPA's Disinfectants and Disinfection Byproducts Rule in 2012, limit the allowable concentration of a variety of chemicals in US drinking water. The new rules will spur world-leading growth in US activated carbon demand between 2011 and 2016, with overall sales expected to more than double.

The activated carbon market in China will be driven by more than regulation, and will advance at a slightly lower rate than sales in the US. While implementation of the newest Five-Year Plan will bolster activated carbon use, gains will also come from increasing consumption by industry, as demand for activated carbon rises faster than the world average. The Twelfth Five-Year Plan will also lead to greater use of activated carbon in water treatment and in air purification. Consumption of activated carbon at the household level in point-of-use tap water filtration systems will also boost demand.

Several other nations will also experience rapid growth. For instance, India is expected to surpass Germany to become the fourth largest market for activated carbon in 2016 (behind Japan), with sales rising on increased food and beverage manufacturing and increased levels of water treatment. Many other nations in the Asia/Pacific region, along with many in Central and South America, Eastern Europe and the Africa/Mideast region, will exceed historical growth levels as industrial, water treatment and food and beverage production markets for activated carbon grow.

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Sample Text, Table & Chart

ASIA/PACIFIC

India: Activated Carbon Supply & Demand

The activated carbon r 7 perc
between 2006 and 2011 to was a
Asia/Pacific average, with for ne
percent of the regional tota lude
beverage production, as we Activ
sales in both of these mark riod,
number of factors.

SAMPLE TEXT

The food and beverage market accounts for the largest p
India's activated carbon demand. Local governments have st
supply drinkable water to the population, and with the growi
tion, bottled water production has increased significantly sinc
addition, India's demand for edible oil has climbed at a consi
for some time. The nation used to import well over 50 perce
edible oil needs, though that percentage had declined to 40 percent by 2011. The production of these oils requires activated carbon for decolorization and filtration. Gains in these markets helped to offset a decline in demand from sugar producers, whose output fell somewhat between 2006 and 2011.

Smaller markets have also contributed to growth. India's motor vehicle production has experienced double digit annual growth since 2001. Activated carbon used in these automobiles has risen at a similar rate. Pharmaceutical manufacturing, a perennial growth market in India, has also increased its consumption of activated carbon as manufacturers have continued to focus on the output of high purity drugs.

As in many other industrializing nations, Indian activate
consumers favor PAC. Low capital costs, combined with ea
make PAC popular with a variety of consumers. This produc
76 percent of the activated carbon market in 2011. GAC, wh

235 Copyright 2012

TABLE VII-15

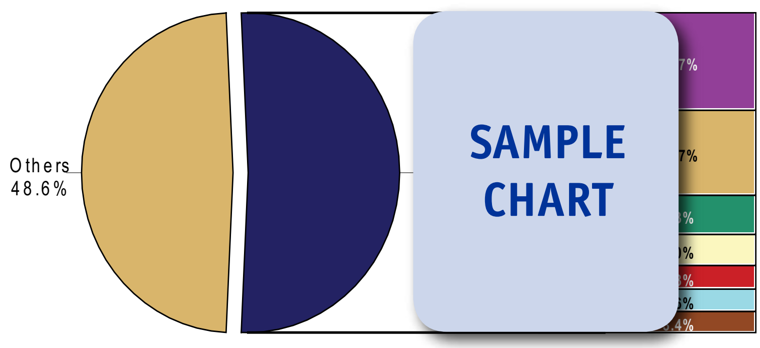
INDIA -- ACTIVATED CARBON DEMAND BY APPLICATION & MARKET (thousand metric tons)

Item	2001	2006	2011	2016	2021
Gross Domestic Product (bil 2010$)					
metric tons AC/bil $ GDP					
Activated Carbon Demand					
By Application:					
Liquid Phase					
Gas Phase					
By Market:					
Industrial					
Water Treatment					
Food & Beverage					
Motor Vehicle					
Pharmaceutical & Medical					
Other					

SAMPLE TABLE

CHART IX-1

WORLD ACTIVATED CARBON MARKET SHARE, 2011 ($2.4 billion)



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Sample Profile, Table & Forecast

TABLE VII-14

INDIA -- ACTIVATED CARBON SUPPLY & DEMAND
(thousand metric tons)

Item	2001	2006	2011	2016	2021
Asia/Pacific Activated Carbon Dmnd	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% India	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Activated Carbon Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Powdered	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Granular	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
- imports	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
+ exports	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Activated Carbon Shipments	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Imports as a Percent of Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Exports as a Percent of Shipments	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

SAMPLE TABLE

COMPANY PROFILES

Shanxi Xinhua Chemical Company Limited
No. 71 Xinlan Road
Taiyuan, Shanxi 030008
China
86-351-287-7[illegible]
http://www.sx[illegible]

Annual Sales: [illegible]
Employment: [illegible]

Key Products: [illegible]alty activated carbon

SAMPLE PROFILE

Shanxi Xinhua Chemical is a manufacturer of activated carbon and related products. Moreover, the Company makes membrane-based filtration systems and components. Shanxi Xinhua Chemical is a state-owned enterprise that is operated by China North Industries Group Corporation.

The Company produces and markets coal-, coconut shell- and wood-based activated carbon in granular, pelletized, powdered and specialty forms under the XINHUA brand name. These products are suitable for a wide range of applications, including water purification, air and gas purification, solvent recovery, odor control in industrial waste gas applications, catalysis, environmental protection, gas masks, decolorization, and desulfurization and denitrification processes.

Shanxi Xinhua Chemical maintains a plant in Taiyuan, Shanxi, China that occupies more than 100,000 square meters of space and has an annual production capacity of 40,000 metric tons. The Company's products are sold to customers in the Asia/Pacific region, Europe, the Africa/Mideast region, North America and South America.

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"Shipments of activated carbon from India's producers are expected to grow at a 14 percent annual rate to 101,800 metric tons in 2016. This pace, faster than the 2006-2011 average, is well above the expected regional activated carbon shipments growth rate for the 2011-2016 period. The trade surplus in India is forecast to increase to 28 percent of total production, reaching 29,000 metric tons in 2016."

--Section VII, pg. 236

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Other Studies

Water Treatment in China

The market for water treatment products in China is expected to grow 10.3 percent annually to 46.6 billion yuan in 2015. The dominant industrial market will offer the best growth opportunities, outpacing the municipal sector. Water treatment chemicals will remain the largest product category, while nonchemical equipment will grow faster. The study analyzes the 28.5 billion yuan water treatment product industry in China, with forecasts for 2015 and 2020 by product and market. The study also evaluates company market share and profiles industry participants.

#2920 .... September 2012................ $5400

World Filters

Global demand for filters is projected to increase 7.6 percent annually to $65.9 billion in 2015. China, India, Indonesia and other countries with large, developing industrial bases and nascent regulatory schemes will see the fastest growth. Manufacturing will be the fastest growing market, while transportation equipment remains the largest. This study analyzes the $45.6 billion world filter industry, with forecasts for 2015 and 2020 by product, market, world region and for 23 countries. The study also evaluates company market shares and profiles industry players.

#2856 .... March 2012................... $6300

Alternative Sweeteners

US demand for alternative sweeteners is expected to advance 3.3 percent annually through 2015 to $1.4 billion. Gains will be led by relatively new entrants such as the stevia extract reb-A. The more mature products -- high intensity sweeteners (such as aspartame) and polyols (including sorbitol) -- will see more restrained, though still healthy, growth. This study analyzes the $1.2 billion US alternative sweetener industry, with forecasts for 2015 and 2020 by product and market. The study also evaluates company market share and profiles industry players.

#2819 ....December 2011 .... $4900

Filters

US filter demand is expected to increase 7.1 percent annually through 2015. Gains will be driven in part by ongoing aftermarket sales and the growing penetration of motor vehicle cabin air filters, diesel emissions filters, and home air and water filters. Demand for filters in the industrial and manufacturing market and key motor vehicle market will be among the fastest growing. This study analyzes the $8.9 billion US filter industry, with forecasts for 2015 and 2020 by medium, product and market. The study also evaluates company market share and profiles industry players.

#2801 .... November 2011 .... $5100

World Water Treatment Products

World demand for water treatment products will rise 6.2 percent annually through 2015. China will remain by far the fastest growing major market. In the US, Japan and Western Europe, gains will favor advanced membrane systems, disinfection and desalination equipment, and industrial wastewater treatment chemicals. This study analyzes the $48.1 billion world water treatment product industry, with forecasts for 2015 and 2020 by product, market, world region and for 30 countries. The study also evaluates company market share and profiles industry players.

#2802 .... September 2011................ $6400

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