Coal-fired power plant standards drive growth of activated carbon

Mercury removal regulations at coal-fired power plants will continue to drive growth in industrial air treatment. We expect growth in the US to slow as the Mercury and Air Toxics Standards come into full effect. However, markets in Western Europe and other developed areas will continue to show healthy gains. In Western Europe, regulations related to mercury emissions are still in the process of being implemented, although it is expected that eventually their standards for mercury removal will match or exceed those in place in the US.

Safer drinking water needed in developing countries

Greater interest and increased investment in safe drinking water will be a major driver of growth in industrializing nations. Limited infrastructure and poorly enforced water treatment standards are leaving plenty of room for gains in many developing countries. High levels of water pollution in some countries, such as India, will also promote demand.

Demand outlook varies by region

Demand for activated carbon -- including powdered, granular, and other types -- will be supported by the continued implementation of environmental regulations in the US, Canada, and Western Europe. In developing countries, efforts to improve drinking water quality, rising manufacturing standards, and increasing motor vehicle ownership rates will also promote higher demand for activated carbon.

The fastest gains in activated carbon demand are expected in the Asia/Pacific region, where growth will be supported by factors such as increasing populations, rising manufacturing output and stricter manufacturing standards, and greater attention to environmental issues such as air and water quality. China will account for the majority of gains, although India and other markets will also exhibit robust growth. Production of activated carbon in this region is expected to rise at a healthy pace in response to growing regional and global demand.

Study coverage

This study analyzes the global activated carbon market. It presents historical data (2005, 2010, 2015) plus forecasts (2020, 2025) for activated carbon supply and demand, as well as demand by product type (powdered, granular, and other) and by application (water treatment, mining, food and beverage processing, pharmaceutical and medical, industrial air purification, and motor vehicle) in six regions and 17 countries. The study also assesses market environment factors, examines the industry structure, evaluates company market share and profiles 34 suppliers to the activated carbon market, including ADA Carbon Solutions, Cabot Norit, Calgon Carbon, Ingevity (WestRock), Jacobi Carbons, Kuraray and Osaka Gas.
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Demand for activated carbon in India is projected to expand at a rate of 6.5% per year in volume terms to 110,000 metric tons in 2020. The best growth prospects in volume terms are expected in the country’s growing water treatment market. Particularly rapid growth is projected in smaller applications such as pharmaceutical processing, industrial air purification, and motor vehicle production. While increases in demand will be supported by the country’s rising emphasis on water treatment and its expanding manufacturing industries, growth is expected to be below the global and regional average as slow gains in India’s large food and beverage segment restrain growth.

In addition, India still lacks the necessary capital and infrastructure to match the water and air treatment standards of industrialized markets.

Food and beverage applications are by far the largest end use for activated carbon in India. The country is the world’s largest producer of sugar for human consumption (when sugar production for biofuels is considered, Brazil is the largest producer). India is also a major producer of edible oils. Sugar and edible oil production both require a purification step to improve the color and purity of the finished product, and in cases activated carbon offers a good balance between effectiveness and cost. As a result, India’s food and beverage market for activated carbon is already well-developed, with relatively little room for growth in activated carbon use rates.

Water treatment accounts for the next largest application in India for activated carbon. In 2011, the government adopted ISO 10500 standards for drinking water and enacted a water rights bill. The Protection, Conservation, Management, and Regulation of Groundwater 2011 law entitles every citizen of India to 70 liters of clean water per day. However, current infrastructure is inadequate for the task of purifying and treating this water.
World Activated Carbon
Industry Study with Forecasts for 2020 & 2025

Freedonia’s methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

About The Freedonia Group

The Freedonia Group is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats.

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