

# World Activated Carbon

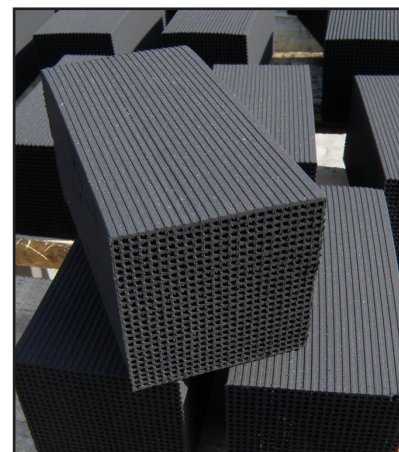
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Industry Study with Forecasts for 2020 & 2025

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Study #3404 | April 2016 | \$6500

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## 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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Activated Carbon Market Outlook  
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Tables for each region/country present historical demand data (2005, 2010 & 2015) plus forecasts (2020 & 2025) for: Activated Carbon Supply & Demand Activated Carbon Demand by Type Activated Carbon Demand by Application

Charts include:

North America: Activated Carbon Demand by Country, 2015  
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**ASIA/PACIFIC**

**India: Activated Carbon Market Outlook**

Demand for activated carbon in India is projected to expand at a rapid rate. The market is expected to grow at a CAGR of 12.5% from 2016 to 2025. The market is driven by the increasing demand for water treatment and air purification. The market is also driven by the increasing demand for activated carbon in the pharmaceutical and food & beverage industries. The market is expected to be dominated by the liquid phase activated carbon segment. The market is also expected to be dominated by the food & beverage application. The market is expected to be dominated by the water treatment application. The market is expected to be dominated by the air purification application. The market is expected to be dominated by the pharmaceutical application. The market is expected to be dominated by the other liquid phase application. The market is expected to be dominated by the other gas phase application. The market is expected to be dominated by the industrial air purification application. The market is expected to be dominated by the motor vehicle application. The market is expected to be dominated by the other gas phase application.

Food and beverage applications are by far the largest end use of activated carbon in India. The country is the world's largest producer of sugar for human consumption (when sugar production for bioethanol 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 these 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

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**RUSSIA: ACTIVATED CARBON DEMAND BY APPLICATION**  
(thousand metric tons)

Item	2005	2010	2015	2020	2025
Gross Domestic Product (bil 2014\$) metric tons AC/bil \$ GDP					
Activated Carbon Demand					
Liquid Phase:					
Water Treatment					
Food & Beverage					
Mining					
Pharmaceutical & Medical					
Other Liquid Phase					
Gas Phase:					
Industrial Air Purification					
Motor Vehicle					
Other Gas Phase					

Source: The Freedonia Group

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**CANADA: ACTIVATED CARBON DEMAND BY TYPE**  
(thousand metric tons)

Item	2005	2010	2015	2020	2025
North America Activated Carbon Demand % Canada					
Activated Carbon Demand					
Powdered					
Granular					
Other					
\$/metric ton					
Activated Carbon Demand (mil \$)					

Source: The Freedonia Group

## This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

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## Related Studies

### World Consumer Water Treatment Systems

Global demand for consumer water treatment systems will advance nearly 12 percent annually to \$16.3 billion in 2019. Sales of point-of-use (POU) systems will outpace those for point-of-entry (POE) systems. The Asia/Pacific and Africa/Mideast regions will be the fastest growing markets. This study analyzes the \$9.4 billion world consumer water treatment system industry, with forecasts for 2019 and 2024 by type and technology for six world region and 19 major countries. The study also evaluates company market share and profiles industry participants.

#3360..... January 2016 ..... \$6400

### Water Treatment Chemicals

Demand for water treatment chemicals in the US is forecast to rise 3.2 percent per year to \$7.5 billion in 2019, with volume reaching 15.5 billion pounds. Foam control agents and coagulants and flocculants will be the fastest growing water treatment chemicals. Energy and manufacturing will be the fastest growing markets. This study analyzes the \$6.4 billion US water treatment chemical industry, with forecasts for 2019 and 2024 by product, application and market. The study also evaluates company market share and profiles industry players.

#3322..... July 2015 ..... \$5300

### Consumer Water & Air Treatment Systems

US demand for consumer water and air treatment systems will rise 5.5 percent annually to \$2.3 billion in 2019. Whole-house systems will be the fastest growing within both the air and water treatment segments. Among consumables, salt will offer the best growth opportunities, followed by water filters and membranes. This study analyzes the \$1.8 billion US consumer market for water and air treatment systems, with forecasts for 2019 and 2024 by technology, product, and US region. The study also evaluates company market share and profiles industry players.

#3281..... July 2015 ..... \$5500

### Pharmaceutical Chemicals

US demand for pharmaceutical chemicals will rise 6.5 percent annually to \$46.9 billion in 2019. Hormones will be the fastest growing products, led by active ingredients of anticancer, antidiabetic, and hormone replacement formulations. Central nervous system chemicals will remain the largest segment, and will be the second fastest growing. This study analyzes the \$34.2 billion US pharmaceutical chemical industry, with forecasts for 2019 and 2024 by product and raw material. The study also evaluates company market share and profiles industry participants.

#3280..... June 2015 ..... \$5200

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## 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

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