

A Guide to Your Business in China

MARKET REPORT

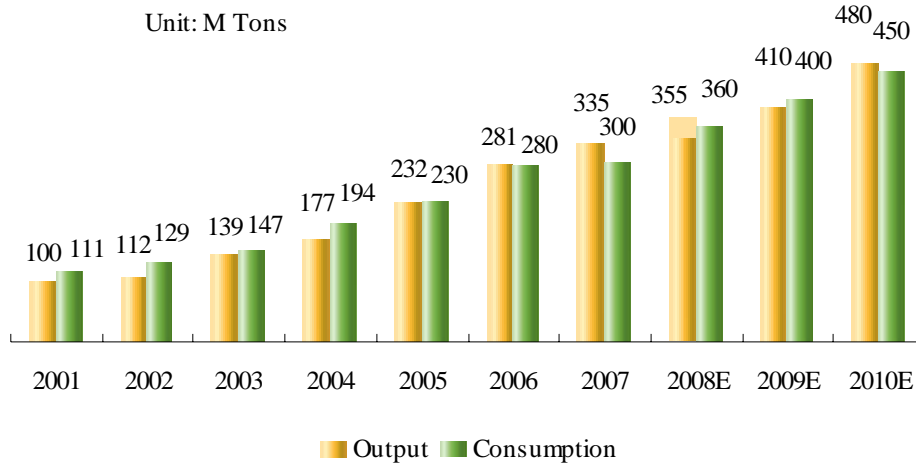
2008 Report on China's Coke Industry

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Description

China is now the largest coke producer, as well as the largest coke consumer in the world. The total output of coke in China in 2007 was 3.36bn tons, accounting for 61% in the world, while the export was 15.3m tons, or 45%.

Figure: Outputs & Consumption of Coke in China 2001-2010



The concentration of China's coke industry has been increasing recently. In 2007, the output from four provinces, Shanxi, Hebei, Shandong and Henan, accounted for 55% of the country's total, out of which the top four coke producers accounted for 8%. As to production capacity, 41 new coke furnaces were completed in China in 2007, with a new annual production capacity of 20 million tons. By the end of last year, the total annual production capacity in China was 360 million tons. Furthermore, from 2008 through 2009, some mechanized mid- and large-sized coke furnaces are under construction or being planned, with a total new capacity of 50 million tons.

The major targets of China's coke export are countries of large-scale steel production, such as Japan, Belgium, Brazil, and India. In 2007, China sold to Japan 3.36 million tons of coke, up by 45.7% year-on-year, and accounting for 22% of China's total coke export; while 3.31 million tons went to the EU, 21.6% of China's total. And half, or 1.54 million tons, of China's coke export to the EU, was to Belgium. In addition, 2.42 million was sold to Brazil and 1.55 million to the U.S. China's aforementioned four provinces claimed 69.5% of China's total coke export.

Since consumption of coke kept increasing rapidly in such industries as steel, iron alloy, calcium carbide, chemical, non-ferrous smelting and mechanical manufacturing, the apparent consumption of coke in China reached 320.24 million tons in 2007, up by 13.81% year-on-year. Coke for industrial purposes accounted for about 96% of total coke consumption in China, while steel and chemical industries reached 75% and 10% of the total coke consumption in China.

Beijing has made unprecedented efforts to adjust the structure of the country's industry to prevent overheating of high-energy-consumption and high-discharge or high-emission industries, and then to promote environmental protection and integrated utilization of resources. The coke industry bears the brunt of those government policies because it's one of the industries that produce the most pollution. Alternatively, the raw materials for coking, the coking coal, is one of the rare coal varieties in China, and the reserves of it is only 27.65% of China's total coal reserves. So Beijing has developed many measures to control the export of coking coal, including high tariffs, limited export quotas, and setting high standards of

becoming coking coal exporters.

This report elaborates on the development environment, supply and demand, industrial scale, import and export, and prices of China's coke industry, in addition to the comparison of business operations of top coke producers in China. Where necessary, the report also gives outlook of China's coke industry.

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