

A 2012 ROSKILL REPORT

THE LEADING
GLOBAL STUDY

Petroleum Coke:

Global Industry Markets & Outlook

ARE YOU FACING BIG DECISIONS INVOLVING PETROLEUM COKE?

The market for petroleum coke is global, and local events can make waves across the world. If you're involved with petroleum coke in any way, you know that everything's important – both the small details and the big picture. A complete perspective is essential, whether you're preparing a company strategy, bringing new products to market, buying, selling or investing.

MAKE THE RIGHT CHOICE

Whatever your challenge, this report gives you deep insights to help you make well-informed recommendations or decisions. It's a detailed account of:

- World production and consumption
- Five year price forecasts
- End-use market applications
- Production costs
- International trade patterns
- The operations of the major producers

IS THIS REPORT FOR YOU?

Our clients include anyone with an interest in the evolving petroleum coke market, anywhere in the world. Readers of past reports have come from a wide range of relevant industries – from extraction to end-use, from refiners to consumers to banks, from existing players to new entrants. And they range from analysts and researchers to operational managers and chief executives.

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WHAT READERS SAY

“When we review project or company opportunities, the most important area of review is the market place. We have always deferred to Roskill reports and their services for the prime benchmark reference point.”

Michael Kiernan,
Consolidated Minerals Limited
Australia

“Roskill has been a key reference to our industry for a long time...the best reference about the market and industries.”

Bayram AnKarali
Etimine SA, Turkey

“One of the few sources available for critical, detailed and reliable information on the industrial minerals markets.”

Emilio Lobato,
Technical Marketing Manager,
Magnesita Refratarios SA, Brazil

GET ACCURATE ANSWERS FROM INDEPENDENT EXPERTS

- Where are existing producers located and where will the new coking capacity be?
- Will the new coking capacity address anode grade shortages?
- What factors are affecting international petroleum coke trade?
- What changes might affect the business environment for oil refiners between 2011 & 2016?

WHY READERS CHOOSE ROSKILL

We're approachable. Our sources include a large network of industry contacts: the key players talk to us because we're approachable and because they know us well.

We're independent. The information and insights in “Petroleum Coke: Global Industry Markets & Outlook” are completely independent.

We're privately-owned and not beholden to anyone. Our expert researchers make a thorough and objective analysis of all available data, from sources across the globe.

We're expert. You want facts from people who know what they're talking about. Roskill's experts have been analysing the petroleum coke industry for over 35 years and this is our 6th report on this sector.

Approachable. Independent. Expert.

That's why no other report can match the accuracy, depth and expertise of “Petroleum Coke: Global Industry Markets & Outlook”.

WHAT ELSE CAN WE DO FOR YOU?

We also offer expert bespoke consultancy to help you tackle specific complex challenges, such as feasibility studies, market assessments or due diligence reports.

If you'd like to discuss a project, please email judith@roskill.co.uk or call +44 20 8417 0087.

Petroleum Coke: Global Industry Markets & Outlook

What's included?

Contents: 247 pages, 131 tables, 66 figures plus trade appendix

OVERVIEW

World consumption of petroleum coke is growing as new coking capacity comes on stream and the quality of oil processed is declining. In 2011, the USA is still the world's largest producer of petroleum coke, but production in Asia, particularly China and India, is growing. By 2016 Roskill forecasts that these two countries could account for one third of global supply which is expected to reach 170Mt. Since the economic crisis in 2009, China has emerged as a significant producer of petroleum coke with production of 24Mt in 2011.

In terms of trade, over the last three to four years, Asian

buyers have taken advantage of competitive freight rates and lower petroleum coke prices to use petroleum coke as a cheaper source of fuel than coal. Prior to this, US and Venezuelan petroleum coke was mainly shipped to cement companies in the Atlantic Basin.

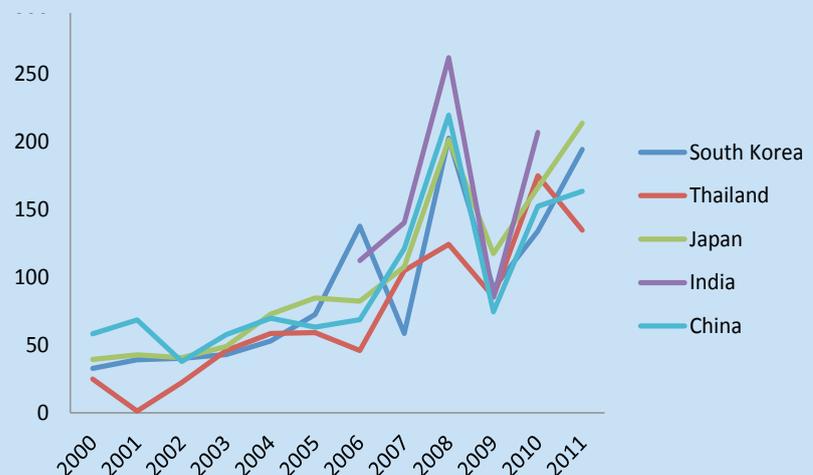
Petroleum coke consumption levels are expected to rise in line with production, as oil refiners are committed to finding their by-product a market. Petroleum coke is one of several low value solid by-products of the oil refining market and this is reflected in its pricing.

The total global market for petroleum coke is relatively small in size, but it is valued at US\$5-6Bn. It is caught between the demands of five other industries – oil refining, electricity generation, cement, steel, and aluminium.

Fuel grade high sulphur petroleum coke is the largest market, estimated at over 75Mtpy. This sector alone is forecast to grow by 4%pa between 2011 and 2016. The highest growth rates will be seen for anode grade coke used in aluminium and other smelters at 6%py. Overall, demand for petroleum coke is forecast to increase by 4%py until 2016.

This report gives you a full analysis of the key trends, issues and developments in the market, a clear insight into all areas of the industry and an authoritative analysis of its prospects.

Asia: Average value of imports of non-calcined petroleum coke, 2000 - 2011 (US\$/t)



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