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# Coal Pitch Market Research in the CIS

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## CONTENTS

ANNOTATION.....	8
Introduction.....	9
<b>1. Raw Materials for Pitch and its Production Methods; Quality Specifications ..</b>	<b>10</b>
1.1. Raw Materials for Pitch Fabrication.....	10
1.2. Pitch Production Technology.....	11
1.3 Quality Specifications for Pitch Produced in the CIS .....	14
<b>2. Pitch Production in the CIS .....</b>	<b>17</b>
2.1. Pitch Output Dynamics and Pitch Manufacturers in the CIS (Russia, Ukraine, Kazakhstan) .....	17
<i>Russia</i> .....	18
<i>Ukraine</i> .....	19
<i>Kazakhstan</i> .....	20
2.2. Description and Current Status of the Leading Manufacturing Plants in Russia....	22
<i>OJSC “Sever Steel”</i> .....	22
<i>OJSC “MMK”</i> .....	23
<i>OJSC “ZSMK”</i> .....	25
<i>OJSC “Altay-Coke”</i> .....	27
2.3 Current Status of the Leading Pitch Manufacturing Plants in Ukraine.....	29
<i>OJSC “Avdeyevsk Coke Chemical Plan”</i> .....	29
<i>OJSC «Coal tar processing plant»</i> .....	30
<b>3. Export and Import of Pitch in Russia and in the CIS.....</b>	<b>33</b>
Russia.....	33
Ukraine.....	36
Kazakhstan.....	39
Other CIS Countries .....	39
<b>4. Survey of Export-Import and Domestic Prices for Pitch .....</b>	<b>40</b>
Russia.....	40
Ukraine.....	42
<b>5. Pitch Consumption in the CIS .....</b>	<b>43</b>
5.1. Anodic Paste and Anode Production .....	48
5.2. Production of Graphitized Electrodes .....	50
5.3. Production of Graphite Materials .....	52
5.4. Other Fields of Application .....	52
5.5. Principal Consumers of Pitch in Russia .....	53
<i>Aluminium Enterprise</i> .....	54
<i>JSC “Krasnoyarsk Aluminium Plant”</i> .....	55
<i>JSC “Bratsk Aluminium Plant”</i> .....	58
<i>JSC “Sayan Aluminium Plant”</i> .....	60

<i>OJSC “Novokuznetsk Aluminium Plant”</i> .....	61
<i>OJSC “Irkutsk Aluminium Plant – SUAL”</i> .....	62
<i>JSC “Bogoslov Aluminium Plant – SUAL”</i> .....	63
<i>OJSC “Volgograd Aluminium Plant – SUAL”</i> .....	65
<i>SUE “Tajikistan Aluminium Company” (TALCO)</i> .....	66
<i>Electrode-Manufacturing Plants</i> .....	68
<i>OJSC “Energoprom-Novocherkassk Electrode Plant”</i> .....	68
<i>CJSC “Energoprom-Novosibirsk Electrodes Plant”</i> .....	71
<i>OJSC “Energoprom-Chelyabinsk Electrode Plant”</i> .....	73
<i>OJSC “Chelyabinsk Electrometallurgical Mill”</i> .....	76
<i>OJSC “UkrGraphite”</i> .....	77
<b>6. Prospects for Pitch Market Development in Russia and the CIS until 2015.....</b>	<b>81</b>
<b>Appendix 1: Contact Information on Pitch Manufacturing Enterprises in the CIS.....</b>	<b>83</b>
<b>Appendix 2: Contact Information on Pitch Consuming Enterprises in the CIS....</b>	<b>84</b>

### List of Tables

- Table 1: Characteristics of Pitch Produced in the CIS
- Table 2: Characteristics of High-Temperature Pitch Produced in CIS
- Table 3: Pitch Quality Specifications
- Table 4: Pitch Production in Russia Separated by Enterprises in 1994-2009, 000 ton
- Table 5: Pitch Production in Ukraine Separated by Enterprise (1997-2009), 000 ton
- Table 6: Pitch Production in Kazakhstan in 1995-2009, 000 ton
- Table 7: Coal Tar Pitch (TU 14-7-120-90) of JSC “Sever Steel” for Anodic Mass Production and Other Applications
- Table 8: Pitch Supplies by JSC “MMK” in 2003-2009, 000 ton
- Table 9: OJSC “ZSMK” Pitch Supplies in 2001-2009, 000 ton
- Table 10: OJSC Altai-Coke Pitch Supplies in 2001-2009, 000 ton
- Table 11: Consumers of Imported Pitch from OJSC “Avdeyevka Coke Chemical Plant” in 2002-2009, 000 ton
- Table 12: Consumers of Imported Pitch from OJSC "Coal tar processing plant"\*, 000 ton
- Table 13: Russian Imports of Pitch Broken by Supplier Countries in 1994-2009, ton
- Table 14: Ukrainian Export Pitch Deliveries in 1999-2009, ton
- Table 15: Distribution of Ukrainian Pitch Exports by Suppliers in 1999-2009, ton
- Table 16: Pitch Export Deliveries from Kazakhstan in 1995-2009, 000 ton
- Table 17: Pitch Imports in Tajikistan by Supply Avenues, 000 ton
- Table 18: Average Annual Pitch Sale Prices at OJSC “ZSMK” (2007-2009), rub/ton
- Table 19: Dynamics of Average Annual Pitch Import Prices Supplied to Russia in 2003-2009, \$/ton
- Table 20: Average Annual Price for Pitch Imported by Principal Consumers in Russia, \$/ton
- Table 21: Average Annual Export Prices for Pitch in Ukraine in 2002-2009 by Supply Avenues, \$/ton
- Table 22: Pitch Production and Consumption Balance in Russia in 1994-2009, 000 ton
- Table 23: Commodity Pitch Consumption Structure in Russia in 2003-2009 by Industry Branches, %
- Table 24: Volumes of Domestic Pitch Consumption by Principal Consumer in 2001-2009, 000 ton
- Table 25: Volumes of Imported Pitch Consumption by Principal Consumer in 2001-2009, 000 ton
- Table 26: Quality Specification for Burnt Anodic Blocks
- Table 27: Quality Specification for Anodic Paste
- Table 28: Volumes of Supplies and Key Suppliers of Pitch to OJSC “KrAZ” (2003-2009), 000 ton
- Table 29: Volumes of Supplies and Key Suppliers of Pitch to OJSC BrAZ (2003-2009), 000 ton

- Table 30: Volumes of Supplies and Key Suppliers of Pitch to OJSC SAZ (2003-2009), 000 ton
- Table 31: Volumes of Supplies and Key Suppliers of Pitch to OJSC “IrkAz-SUAL” (2003-2009), 000 ton
- Table 32: Volumes of Supplies and Key Suppliers of Pitch to OJSC “BAZ-SUAL” (2003-2009), 000 ton
- Table 33: Volumes of Supplies and Key Suppliers of Pitch to OJSC “VgAZ-SUAL” (2003-2009), 000 ton
- Table 34: Volumes of Pitch Supplies to “NEZ” Separated by Suppliers in 2003-2009, 000 ton
- Table 35: Volumes of Pitch Supplies to “NovEZ” Separated by Suppliers in 2003-2009, 000 ton
- Table 36: Volume of Production at “NovEZ” in 1996-2009, 000 ton
- Table 37: Volume of Different Products Output at “ChEZ” in 2001-2009, 000 ton/million ruble
- Table 38: Range of Products of OJSC “UkrGraphite”

## List of Figures

- Figure 1: Dynamics of Pitch Production in the CIS (1997-2009), 000 ton
- Figure 2: Share of Russia, Ukraine and Kazakhstan in Total CIS Pitch Production, 1997-2009, % %
- Figure 3: Shares of Russian Enterprises in Pitch Production in 1997-2009, %
- Figure 4: Dynamics of Bulk Pitch Production at OJSC “Sever Steel” in 1994-2009, 000 ton
- Figure 5: Dynamics of Pitch Production at OJSC “MMK” in 1994-2009, 000 ton
- Figure 6: Dynamics of Pitch Production at OJSC ZSMK in 1994-2009, 000 ton
- Figure 7: Dynamics of Pitch Production at OJSC “Altai-Coke” in 2001-2009, 000 ton
- Figure 8: Dynamics of Pitch Production at OJSC “Avdeyevka Coke Chemical Plant” in 2003-2009, 000 ton
- Figure 9: Dynamics of Pitch Production at OJSC “Coal tar processing plant”, 000 ton
- Figure 10: Dynamics of Pitch Import-Export by Russia in 1995-2009, 000 ton
- Figure 11: Distribution of Pitch Imports to Russia among Principal Suppliers in 2004-2009, %
- Figure 12: Dynamics of Pitch Exports by Ukraine in 1999-2009, 000 ton
- Figure 13: Distribution of Pitch Exports from Ukraine among Suppliers in 2009, %
- Figure 14: Dynamics of Pitch Imports by Ukraine in 2005-2009, 000 ton
- Figure 15: Dynamics of Prices for Pitch Imported by Russia, \$/ton
- Figure 16: Dynamics of Everage Annual Exported Pitch Prices in Ukraine in 2002-2009, \$/ton
- Figure 17: Level of Pitch Apparent Consumption in Russia (1994-2009), 000 ton
- Figure 18: Production of Graphitized Electrodes by Russia (1996-2009), 000 ton
- Figure 19: Pitch Principal Consumers in Russia (2008-2009), 000 ton
- Figure 20: Dynamics of Pitch Delivery to Aluminium Mills of RF in 2001-2009, 000 ton
- Figure 21: Dynamics of Pitch Supplies to OJSC “NkAZ” in 2001-2009, 000 ton
- Figure 22: Dynamics of Baked Anode Production at SUE “Tajikistan Aluminium Company” in 2001-2009, 000 ton
- Figure 23: Dynamics of Various Products Output at “NEZ” in 2004-2009, 000 ton
- Figure 24: Dynamics of NEZ Revenues in 2005-2009 (million rubles) and its Share in Graphitized Electrodes Revenues (%)
- Figure 25: Dynamics of Pitch Supplies to OJSC “ChEZ” in 2003-2009, 000 ton
- Figure 26: Dynamics of “ChEZ” Revenues in 2005-2009 (million rubles) and their Share in Graphitized Electrodes Revenues (%)
- Figure 27: Dynamics of Electrode Products Output at OJSC “ChEMK” and Pitch Supplies in 2003-2009, 000 ton
- Figure 28: Dynamics of Graphitized Electrodes Production at OJSC “UkrGraphite” in 2001-2009, 000 ton
- Figure 29: Dynamics of Bulk Pitch Production (Russia, Ukraine) in 2007-2009 and its Outlook until 2015, 000 ton
- Figure 30: Forecast for Electrodes Pitch production in Russia until 2015, 000 ton

## ANNOTATION

The actual report is devoted to study of current situation in the market of Coal Tar Pitch in the CIS countries and to the forecast of its development. The Report consists of six Sections, contains 84 pages, including 38 tables, 30 figures and 2 supplements. This work is a desk research. As information sources we used the data of Federal State Statistics Service (Rosstat), the State Committee of Statistics for CIS countries, Federal customs service of the Russian Federation (RF FCS), the branch official statistics of railroad transportation of the Russian Federation, the branch and regional press, annual and quarterly accounts of emitters of securities as well as Internet sites of the enterprises manufacturers and consumers.

The Report's **First Chapter** presents features of raw materials brief required for pitch manufacturing. The Section also considers methods and peculiarities of pitch generation, its marks and characteristics.

The **Second Chapter** of the Report is devoted to production of the pitch in the CIS countries (Russia, Ukraine and Kazakhstan). This Chapter of the Report provides data in regard of this product volume of output in 1994-2009 at the CIS enterprises. In addition a section of the Chapter is devoted to description of the current status of the principal pitch producers in the CIS including in particular supply data.

The **Third Chapter** of the Report contains data over pitch foreign trade operations in Russia (1994-2009), in Ukraine (1999-2009), in Kazakhstan (1995-2009) and in Tajikistan (2003-2009).

The **Fourth Chapter** analyses movement of pitch export-import prices in Russia (1994-2009) and in Ukraine (1999-2009).

The **Fifth Chapter** of the report assesses pitch consumption in Russia. This Chapter provides balance between the pitch output and consumption (1994-2009), the branch structure of consumption, quotes Russian principal consumer (giving volumes of consumption in 2003-2009) as well as pictures current status and prospects for development of major consuming enterprises (aluminium and electrodes plants).

The Sixth, final chapter of the report provides forecast for the pitch production in Russia and in Ukraine as well as outlook for pitch consumption in Russia until 2015.

The Supplements provide contact information for pitch producers and consumers in the CIS countries.



## Introduction

Target issue of this study is the market of coal tar pitch. It comprises big enough number of participating enterprises, which belong to various branches of industry (coal-mining, ferrous- and non-ferrous metallurgy).

As is known, processing of coking coal is carried out at coke plants, which belong to ferrous metallurgy. They obtain coking coal from coal-mining enterprises.

Coal tar being produced at coke plants is raw material for production of the pitch. Industrial pitch is the key component for manufacturing of anodic paste, graphitized electrodes, and various carbonic engineering materials, which are produced at enterprises of non-ferrous metallurgy (electrode and aluminium plants). Meanwhile, some portion of pitch is used in pitch coke production.

The scale of pitch production depends primarily on production of coal tar, and coal tar volume of output depends on the quantity of metallurgical coke consumed in pig-iron production.

Thus, output of coal tar, pitch and pitch coke decides the leading role of coke enterprises in supplying non-ferrous metallurgy enterprises with carbonic raw materials required for manufacturing of commercial commodity. However, the production of tar coal, pitch and pitch coke is a co-production process, and it depends on the volume of metallurgical coke output.

An analysis of trends in ferrous metallurgy concludes that blast-furnace process will secure its importance in spite of development of alternative technologies (e.g. direct reduction of iron) for quite a long. This, in its turn, will at least support demand for metallurgical coke, which could be just partially substituted with some other kind of fuels in the blast-furnace process.

On the other hand, there is some increase in consumption of pitch being observed because any reasonable substitute for pitch does not exist. High demand for pitch constrains production of pitch coke. Meanwhile the role of pitch coke is not so high for it is possible to use petroleum coke as its substitute. In any case, demand for steel making coke, pitch and pitch coke is most often very much different.

# 1. Raw Materials for Pitch and its Production Methods; Quality Specifications

## 1.1. Raw Materials for Pitch Fabrication

Tar pitch is raw material for pitch production. It is one of by-products of charge coal carbonization at by-product coke plants. Volatile matter produced by carbonization process quit the cells and enter gas collector for recovery. Coal tar is being produced at recovery shops of by-product coke plants.

Composition, yield and properties of coal tar depend on composition of the coal charge, oven design and carbonization conditions (first of all, on the temperature of under-roof space and holding time of the volatiles inside the oven).

Yield and quality of coal tar are determined by content of volatiles in the charge (the higher the volatiles content, the better will be pitch). That is why the content of G, GZhO, GZh brands (gas coals) should be as large as possible in the charge, though, from the point of view of metallurgical coke manufacturers, the former two brands represent low-coking and of-limited-use coal. Thus, the maximum yield of pitch does not always correspond to the output of high-quality metallurgical coke.

In 70-80s of the XX century, the development of by-product coking industry in the former USSR led to increase in the yield of tar and improvement of its quality. Predominantly that was due to increase in proportion of gas coal in the charge (especially at Ukrainian enterprises). Besides, large-capacity ovens were put into operation, and the coking temperature increased. At that, quality properties of coal tar also modified considerably. Its density rose, the content of insoluble with toluol and quinoline substances increased and yield of pitch grew. Improvement in tar quality came from a number of modern technical solutions for carbonization of the charge: reduction of under-roof space in coking box and minimization of dust fractions rate in coal charge.

However, in the middle of 90s, quality of coal tar produced at enterprises of the former USSR somewhat decreased. The reasons are failures in coking coal supply and inconsistent quality of coal charge being processed.

By-product coke producing capacities in the USSR were most advanced in Russian Federation and Ukraine. Major tar pitch producing enterprises in Russia boast its yields from metallurgic coke in the range of 4.2%-4.8%. Output of tar pitch in Russia in 2003-2008 accounted for some 1.2-1.3 million ton; in 2009 it decreased to 1.1 million ton. Tar output in Ukraine till recently stood for 900,000 ton; in 2009 it dropped down to 750,000 ton.

## 1.2. Pitch Production Technology

Coal tar for pitch making is being processed at tar-processing shops. There are 17 tar-processing shops in the CIS territory.

In CIS countries, tar-processing shops operate practically under the same workflow as follows: rectification of tar through one-pass vaporization in a continuous flow tubular unit equipped with one or two rectification towers. Capacity of tar-processing shop at most big enterprises stands for 200 thousand ton of tar per annum.

Coal pitch is the most large-tonnage product of coal tar processing and its yield from tar accounts for up to 60%.

Key properties of pitch obtained through tar distillation are density, viscosity, surface tension, wettability, thermal stability, sintering ability as well as ability of producing carbon residue. These properties are not the same for pitches with different softening temperature, and depend on the raw material quality and conditions for pitch manufacture. Properties of medium-temperature pitch (softening temperature below 100 degree) are generated by features of tar and conditions of its distillation.

Major pitch quality stabilizing factor is invariability of tar properties set. This feature, in its turn, depends on stability of coal charge processed at by-product coke plants.

It should be noted that the main mission of by-product coke plants is obtaining metallurgical coke and all technological factors of coking furnaces operation serve that mission. That is why, in most cases no attention is paid to the matters of regulating the pyrolyzation degree of the tar at the coking stage (the degree should be either low or medium), which affects quality of electrode pitch production.

Table 1 shows the characteristics of medium-temperature electrode pitch produced at some CIS enterprises.

**Table 1: Characteristics of Pitch Produced in the CIS**

Supplier	Electrode pitch as binder (GOST 10200-83)			
	Softening temperature, C°	Yield of Volatiles, %	Fraction content, %	
			$\alpha$	$\alpha_1$
<i>Brand B</i>	67-73	58-62	25-31	-
“ChMK”	70.5	59.2	33.9	13.5
“NTMK”	67.0	59.5	32.0	7.0
“MMK”	73.0	59.2	24.5	8.3
“ZSMK”	75.0	55.0	41.0	12.0
“Dneprodzerzhinsk Chemical Coke Plant”	67.7	60.8	30.2	3.5
“Zaporozhe Coke”	68.0	56.7	36.5	8.4
<i>Brand V</i>	85-90	53-57	< 31	< 12
“ZSMK”	88.0	54.0	50.0	17.0
“Makeyevka Chemical Coke Plant”	87.0	55.4	43.2	8.2
“Gubakhino Chemical Coke Plant”	90.0	52.0	44.0	12.0

*Source: analysis of articles published in the “Coke and Chemistry” journal*

In the process of manufacture of high-temperature pitch (softening temperature over 100 degrees), medium-temperature pitch is subjected to thermal treatment in still-reactors (the number of them at operating mounts varies from five to eight units). Russian by-product coke industry operates bubbling still-reactors of vertical tar-still design. The yield of high-temperature pitch nears 85-87%. According to the experts, the method of thermal treatment in still-reactors provides rather limited capabilities for regulation of physical-and-chemical properties of high-temperature pitch produced, which properties are much more dependent on characteristics of original tar than on process variables.

Table 2 shows the characteristics of high-temperature pitch produced at some CIS enterprises.

**Table 2: Characteristics of High-Temperature Pitch Produced in CIS**

Enterprise	Softening temperature, C°	Fraction content, %		Yield of Volatiles, %	Carbon residue, %
		$\alpha_1$	$\alpha_2$		
“Zaporozhe Coke”	140	29.6	17.2	50.5	64.2
“Sever Steel”	142	30.3	18.4	48.8	66.3
“Mittal Steel Temirtau”	140	30.5	14.0	54.6	60.8

*Source: analysis of articles published in the “Coke and Chemistry” journal*

High-temperature pitch is produced in large quantities at by-product coke plants in the CIS, but it is just an intermediate product for pitch coke production. Until recently, pitch as a commodity product was produced at Gorlovsk by-product coke plant (at present - OJSC “Tar Processing Plant”, Ukraine), now *its* production has been launched at some other enterprises (in particular, OJSC “Sever Steel”).

High-temperature pitch is produced at “Gorlovka Chemical Coke Plant” at a 33,500 tpa unit operating the method of continuous oxidation in three still-reactors with the total capacity of 150 m<sup>3</sup>. Granulation and filling-up of pitch is carried out at a granulation unit. Softening temperature for the high-temperature pitch produced is 155-160 degree, content of ashes is 0.07-0.19%; humidity is 1.4-2.0%.

### 1.3 Quality Specifications for Pitch Produced in the CIS

As was mentioned above, coal pitch is a unique binder component for manufacture of anodic paste, graphitized electrodes, engineering and other materials. Most of electrode pitch is used for these purposes.

Quality Specifications for coal electrode pitch in the USSR were regulated by the GOST 10200-83 standard. Under these standards, pitch coke is produced in three brands (A, B, V).

Medium-temperature generated from high-pyrolization tar in the process of its continuous distillation is also used as binder for anodic paste production. Properties of this pitch are regulated by the TU 14-7-83-86 requirements.

Properties of pitch for other purposes (besides electrode pitch) are set by the GOST 1038-75 regime. The standard supposes obtaining medium-temperature A and B brands pitch, as well as high-temperature pitch for pitch coke production.

Major requirements to pitch for pitch coke production are softening temperature and ashes content. The higher softening temperature and the lower ashes content, the better raw material for coking the pitch is considered to be. Therefore, according to expert, the requirements to ashes content, regulated by GOST 1038-75 (less 0.2%) are lower against most values of foreign brands (excluding Japan).

Brands A and B medium-temperature pitch can be used for production of structural materials, tape paste for blast furnaces and for some other purposes.

Besides medium-temperature pitch, high-temperature (high-melting) pitch is used as a binder at production of carbon electrical materials and carbonic engineering materials. It should match requirements of TU 14-6-84-72.

In electrode production, penetrating-type coal pitch is used for soaking graphitized electrodes matching requirements of TU 14-7-70-80.

Regulated also are Specifications of high-temperature pitch, which is used in blast-furnace refractory mixtures (TU 14-6-128-75) and in manufacture of anodic paste (TU 14-6-65-85).

Thereby, specifications of several brands of high-temperature pitch being used in manufacture of various kinds of products are regulated by the standards: pitch coke as binder for anodic paste, engineering and graphitized carbon items and blast-furnace refractory mixtures (see table 6).

The most promising field of high-temperature pitch application is fabrication of pre-burnt anodic blocks which allows improvement of technological effectiveness of aluminium production and environment protection.

Vide variety of spheres for high-temperature pitch applications also determine this product's different quality specifications, which cannot reflect the existing standards for engineering specifications in total. For example, anodic paste manufacture requires pitch to add high mechanical strength to a burnt block (with concurrent bearing minimum of harmful substances in volatile products of carbonization). Engineering materials fabrication requires pitch, which forms easy-graphitized coke with minimal specific resistance, and carbon electrical materials manufacture requires pitch with enhanced plasticizer properties; production of refractory mixtures for blast furnaces needs pitch with high fusing and increased coke-formation properties.

**Table 3: Pitch Quality Specifications**

Index	Electrode pitch* GOST 10200-83			Medium-temperature pitch TU 14-7-83-86	Coal pitch GOST 1038-75			High-temperature pitch TU 14-6-84-72		Penetrating- type coal pitch TU 14-7-70-80	High-temperature pitch		
	A	B	V		A	B	high- temperature	V	G		TU 14-6-128-75		TU 14-6-65-85
											A	B	
Softening temperature, C <sup>0</sup>	65-70	67-73	85-90	65-72	67-75	76-83	135-150	120-135	135-195	70-75	221-250	200-220	110-120
Mass concentration, %													
Toluol insoluble substances	24-28	25-31	25-31	25-31	No standard		-	43-48	46-54	19	-	-	39-45
Quinoline insoluble substances	7	8	12	11	No standard		-	18-20	20-32	5	-	-	20
Yield, %													
Volatiles	59-63	58-62	53-57	55-60	No standard		<51	No standard		<64	-	-	47-53
Coke, less	No standard							57-59	54-60	-	65	60	56
Ashes, less	0.3	0.3	0.3	0.2	0.4	0.4	0.2	0.2	0.2	<0,3	0,3	0,3	0,3
Field of application	Binder for anodic paste, graphitized electrodes and engineering materials production			Binder for anodic paste production	Structural materials and bottling clay production		Pitch coke production	Engineering graphitized carbon material production		Soaking graphitized electrodes	Refractory mixtures for blast furnaces		Anodic paste

*\*Temperature characteristics of pitch: Temperature C<sup>0</sup>: flash, over 210, inflammation, over 250, spontaneous ignition, over 570, field of vapor inflammation 125-145*