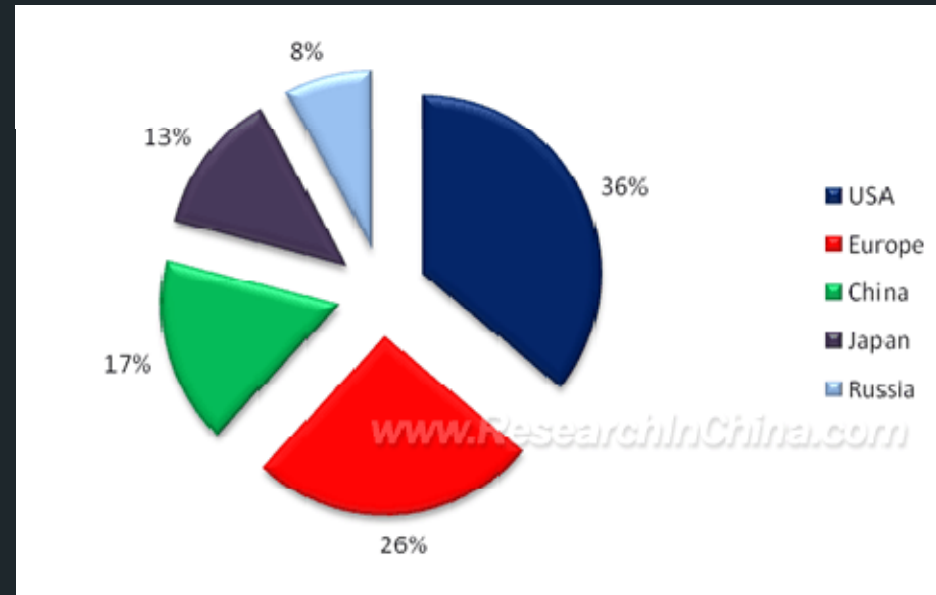


## Global and China Titanium Industry Report, 2009-2010



Titanium, an important strategic metal, has many advantages such as high specific strength, corrosion resistance, biocompatibility and non-magnetic. Global consumption of titanium products is mainly concentrated in countries and regions like the United States, Europe, China and Japan. In developed countries and regions such as the United States, Europe and Japan, titanium is mainly applied in the aviation and aerospace field, making up about 60%; while in China, it is mainly used in sectors including chemical industry, pharmaceutical and metallurgy, covering around 70%.

### Global Titanium Consumption by Region, 2009

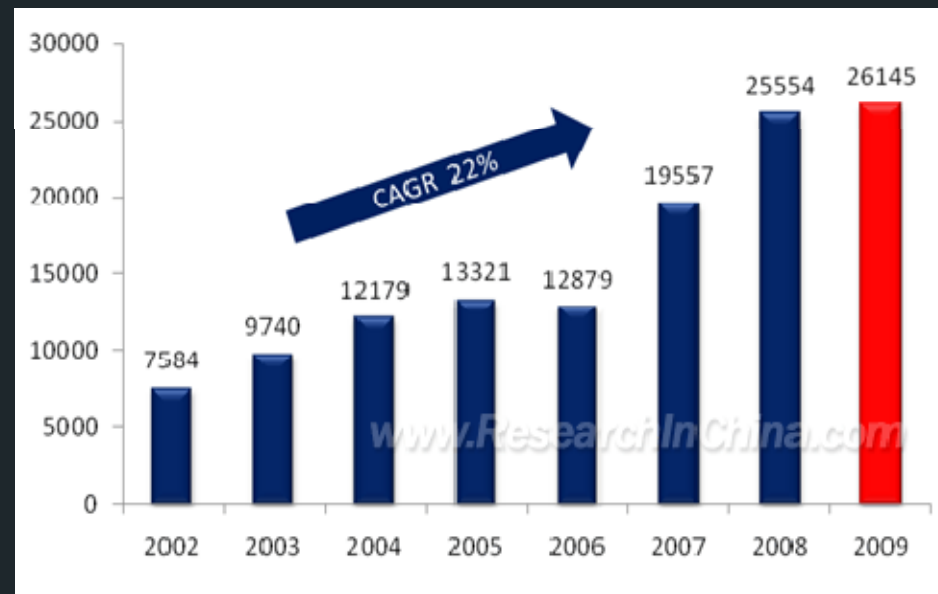


Source: TIMET, ResearchInChina

From the perspective of titanium industry supply and demand, the global production of upstream and downstream products such as titanium sponge and the processing of titanium mill products features higher regional concentration, and only the United States, Japan, Russia and China have the complete industry chain from titanium sponge to the processing of titanium mill products. In 2009, the apparent consumption of titanium all over the world experienced a year-on-year drop of 32%, which resulted in a big fall in the output of titanium sponge and titanium mill products of the world's major titanium producers, of which, China witnessed a decline of 17.8% and 10% year-on-year respectively in 2009 as well.

The worldwide commercial aviation industry has started to rebound entering the year of 2010. The accelerated delivery of large passenger aircrafts such as Boeing 787 and Airbus A380 in the coming two years will boost up the demand for aerospace titanium mill products, and hence propel the global consumption and demand of titanium mill products. In the meantime, as China's new regional aircrafts like ARJ21 and Modern Ark 60 have won 340 orders, and the large aircraft project is in progress, it is projected that China's demand for aerospace titanium mill products will reach 92,000 tons in the next decade.

### China's Apparent Consumption of Titanium, 2002-2009 (ton)



Source: China Nonferrous Metals Industry Association, ResearchInChina

With the growing consumption of titanium mill products in China, the world's titanium giants including VSMPO-AVISMA and TIMET have successively entered China's market through selling products or establishing joint ventures. Among domestic companies, Baoji Titanium Industry Co., Ltd has stood out for its M&A and restructuring in recent years, and it has further improved its industry chain after acquiring Huashen Titanium Industry Co., Ltd in 2008.

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