



China Tin Industry Statistics, 2010

Mar. 2011

This report

- ◆ Analyzes China's tin industry.
- ◆ Focuses on supply and demand of tin worldwide and China.
- ◆ Highlights import and price of tin in China.

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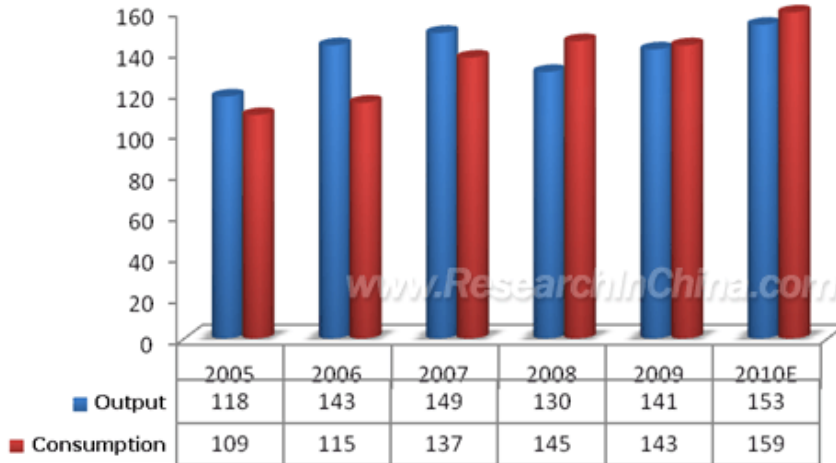
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Abstract

Fueled by the tin demand in Chinese solder market, global tin market has rapidly recovered. In 2010, the global tin consumption would arrive at 360 kilotons, up 11.8%YoY against 2009. Wherein, Chinese tin consumption accounted for approximately 44% of global total, up 11% from 2009. China's tin output also maintained stable growth in 2010 and reached 153 kilotons, up 8.5%YoY from a year ago.

Tin Output and Consumption in China, 2005-2010 (Unit: Kt)



Source: National Bureau of Statistics of China; ResearchInChina

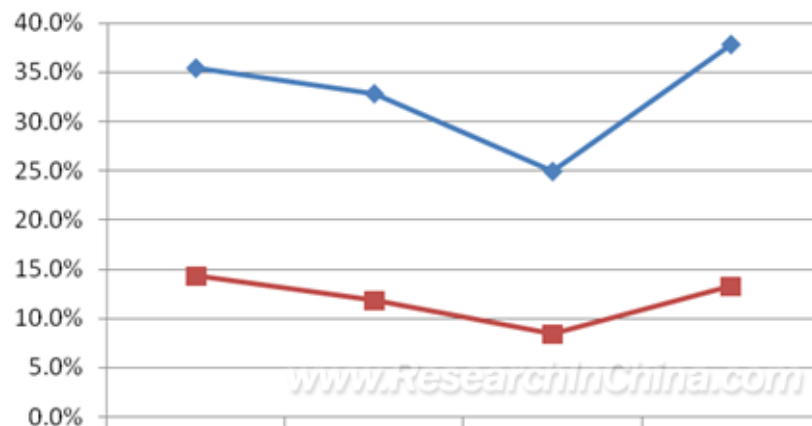
The growing demand of both domestic and overseas tin markets has brought along the ever rising prices of tin ore and refined tin. In mid December 2010, the price of tin concentrate (purity: 60%) in China hit RMB149,450/ton, a growth margin of 53.3% against that in early 2010; and that of 1# tin rested on RMB168,645.8/ton in January 2011, up 26.8% from the same period of 2010.

Correspondingly, the price growth margin of upstream tin ore was evidently higher than that of downstream refined tin, which exerted unfavorable influence on the benefits of domestic tin smelting industry which featured relatively low self-sufficiency rate of tin ore.

Considering the benefits between domestic tin ore mining & dressing industry and tin smelting industry in 2010, the upstream tin ore mining & dressing industry has higher profitability than the downstream tin smelting industry. Up till November 2010, the

gross margin of Chinese tin ore mining & dressing industry reached 37.8%, while that of tin smelting industry was merely 13.3%. The hiking price as a result of supply shortage of tin ore added cost pressure to the downstream tin smelting industry.

Gross Margin Comparison between Tin Ore Mining & Dressing Industry and Tin Smelting Industry in China, 2010



— Mining & Dressing

— Smelting

Source: National Bureau of Statistics of China; ResearchInChina

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