



Global and China Zirconium Industry Report, 2010

Mar. 2011

This report

- ◆ **Analyzes the status quo and development of the global and China's zirconium industry.**
- ◆ **Focuses on the development of zirconium product segments in China, such as traditional zirconium product, zirconium metal products, and new zirconium products.**
- ◆ **Highlights the operation and development of key enterprises in zirconium industry in China.**

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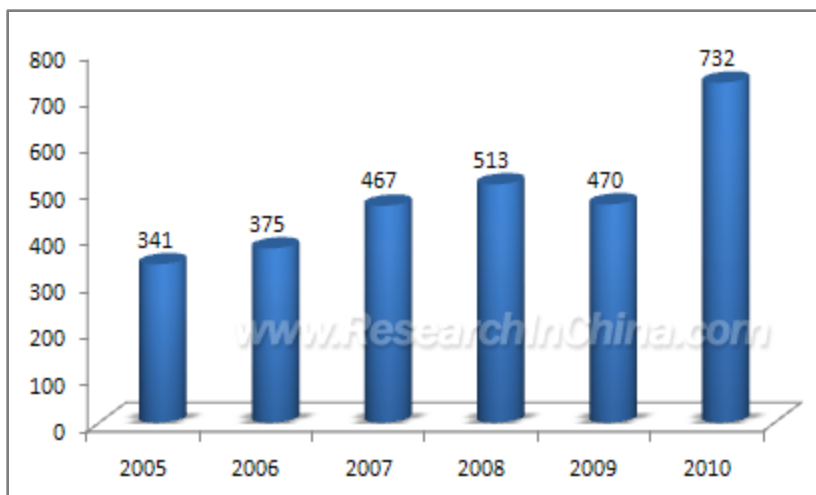
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Abstract

In 2010 when zirconium product industry of China entered the stage of rapid development, the demand of raw material zircon sand increased consequently. Due to insufficient supply of zircon sand domestically, China's import volume of zircon sand increased by 55.7% year-on-year and made a new record of 732 thousand tons in 2010; wherein, Australia and South Africa were the main origins of import for China.

Import Volume of Zircon Sand in China, 2005-2010 (Kiloton)



Source: China Customs, ResearchInChina

Two main categories of zirconium products include zirconium chemicals and zirconium metal. Represented by zirconium silicate and zirconia, zirconium chemicals are mainly applied in the fields of ceramics and fireproofing, which accounts for 90% of the zircon consumption. In comparison, the zirconium metal shares 3-4% of total zirconium consumption currently, and 90% of zirconium metal, as a high-end product of zircon, applies as special material for nuclear reactor.

Zirconium Silicate

As an upstream primary product, zirconium silicate is mainly used in ceramic industry. In 2010, the capacity of zirconium silicate in China reached approximately 400 thousand tons. Over 40 manufacturers of zirconium silicate mainly converge in Fujian, Guangdong, and Shandong provinces in China.

Zirconium Oxychloride

As a kind of intermediate product of zircon, zirconium oxychloride is primarily utilized to produce zirconium chemicals, such as zirconium dioxide, zirconium sulfate and zirconium carbonate. Till 2010, the industrial capacity of zirconium oxychloride totaled around 300 thousand tons. As a result of abundant supply, the market price of zirconium oxychloride keeps at an ever low level in recent years, which leads to the low gross margin of main manufacturers of zirconium oxychloride in China.

Zirconium Dioxide

As one of the important zirconium chemicals, zirconium dioxide is mainly applied in the sectors like ceramics, glass and fireproofing. In recent years, the capacity of zirconium dioxide in China experienced rapid expansion especially that of high purity zirconium dioxide. Key manufacturers of zirconium dioxide in China consist mainly of Changzhou Baolong Chemicals Co., Ltd., Zhejiang Shenghua Biok Biology Co., Ltd and Zibo Guangtong Chemical Co., Ltd, etc. High purity zirconium dioxide project invested in 2009 by Guangdong Orient Zirconic Ind Sci & Tech Co., Ltd has been put into production,

and its capacity will register 6,000 tons annually once it is fully operated.

Zirconium Sponge

Zirconium sponge mainly includes industrial zirconium sponge and nuclear level zirconium sponge, both of which are high-end products in the zirconium industrial chain. In China, the manufacturing of zirconium sponge gives priority to industrial zirconium sponge, but with its capacity comparably small. Till 2010, the total capacity of five main manufacturers including Chaoyang Baisheng Titanium and Zirconium Co.,Ltd., BaoTi Huashen Titanium Industry Co., Ltd and CITIC Jinzhou Metal Co.,Ltd. etc. merely reached 2,200 tons. In the arena of nuclear level zirconium sponge, the key domestic producers of zirconium product including Guangdong Orient Zirconic Ind Sci & Tech Co., Ltd, Jiangxi Kingan Hi-Tech Co., Ltd, and State Nuclear WEC Zirconium and Hafnium Co., Ltd., all have their specific project planning.

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