



China Germanium Industry Report, 2011

May 2011

This report

- ◆ **Analyzes the development of global and China germanium industry.**
- ◆ **Focuses on the application fields of germanium, including optical fiber, infrared optics, solar cell, and PET catalyst.**
- ◆ **Highlights the operation of key manufacturers in China.**

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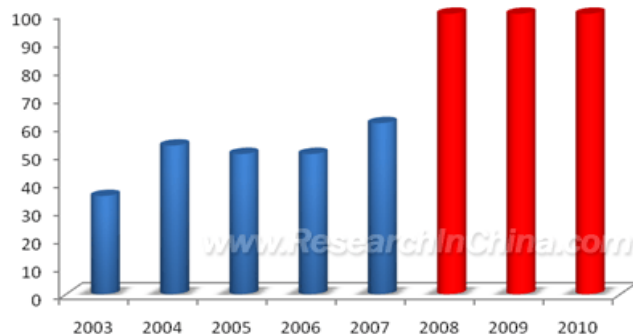
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Abstract

China is the world's largest producer and exporter of germanium. With the recovery of germanium demand worldwide after the financial crisis, the germanium output and export price of China saw sustained surge. The year of 2010 marked the third consecutive year for China's germanium output in excess of 100 tons (metal equivalent), accounting for 70% or more of the global total. As of Q1 2011, China's export price of germanium picked up to USD1, 219/kg, close to the peak since 2008.

Presently, China is still the major producer of primary germanium products such as germanium dioxide and zone-refined germanium ingot. Granted, domestic heavyweights including Yunnan Lincang Xinyuan Germanium Industrial Co., Ltd, Yunnan Chihong Zn&Ge Co., Ltd and China Germanium Co., Ltd are going into overdrive to invest in deep-processing germanium products such as monocrystalline germanium slices for infrared optics and solar cell use.

Germanium Output in China, 2003-2010 (Metal tonne unit)



Source: USGS; ResearchInChina

Capacity of Major Germanium Dioxide & Zone-refined Germanium Ingot Producers in China, 2010

Producers	Capacity (ton/year)
Yunnan Lincang Xinyuan Germanium Industrial Co., Ltd	39
China Germanium Co., Ltd	30
Yunnan Chihong Zn&Ge Co., Ltd	20
Xilingol Tongli Ge Refine Co., Ltd.	15
Shaoguan Smelting Plant	10
Shanghai Longtai Copper Industry	10

Source: ResearchInChina

Yunnan Lincang Xinyuan Germanium Industrial is not only the largest enterprise in terms of germanium source reserves and capacity of primary germanium products, but also the only domestically listed company primarily focused on the germanium-based products. As of 2010, its capacity of germanium metal registered 39 tons/year, while that of germanium deep-processed product- infrared monocrystalline germanium-realized 10 tons/year.

Yunnan Chihong Zn&Ge Co., Ltd is also one among the domestic key industry champions, with its capacity hitting 30 tons/year in 2010. The company is projected to expand its existing capacity of germanium products to 40 tons by 2015, with the investment highlighting high-end germanium products such as monocrystalline germanium slices for infrared optics and solar cell use, and germanium tetrachloride for optical use.

China Germanium is one of the enterprises that earliest tapped into germanium metal smelting in China. It has worked to expand its business in recent years towards upstream germanium ore realm through share-participation of Xilingol Tongli Ge Refine. As of 2010, the capacity of primary germanium products of the company reached 30 tons/year, making it become the second largest manufacturer of primary germanium products in China. China Germanium plans to make intensified efforts in expanding its annual capacity of infrared monocrystalline germanium slices to 22 tons from the present 5 tons by means of fundraising as a listed company in the upcoming years.

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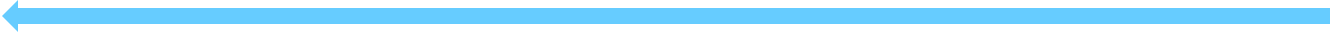
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