



# China Fluorite Industry Report, 2011

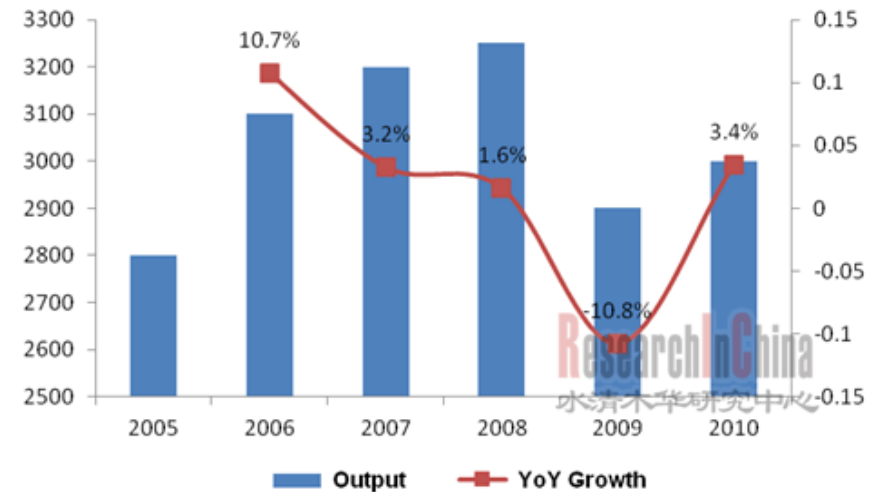
Nov. 2011

## Abstract

China, Mexico, Mongolia are the major fluorite producers worldwide. However, except for China, other countries carry limited production. In 2010, China produced three million tons of fluorite, sharing 55.6% of the global total.

In recent years, China has promulgated a series of measures to protect fluorite resources, and the aggregate mining indicators also dropped to 10.5 million tons in 2011 from 11 million tons in 2010. Following China's strengthened protection over fluorite resources, the global output of fluorite will not see a significant increase in the future, while there will be the rising demand for fluorite from downstream fluorine chemical industry, iron and steel, building materials, etc., therefore, the future supply will be in tight state, leading to higher prices.

Output and YoY Growth of Fluorite in China, 2005-2010  
(mIn tons, %)



Source: USGS

China Fluorite Industry Report, 2011 mainly covers the followings:

- ◆ Reserves, Distribution, Output and Demand of Global and China Fluorite Industry.
- ◆ Volume, Structure and Average Price of China Fluorite Import and Export.
- ◆ Operations, Development Strategy, Fluorite Resources Distribution, M&A Dynamics, etc. of Key Domestic and Foreign Fluorite Manufacturers and Fluorine Chemical Companies.

Possessing complete fluorine chemical industry chain, Sinochem is China's leading fluorine chemical manufacturer. As of the end of 2010, it had a total of two fluorite resource-based enterprises, with over 30 million tons of fluorite reserves. In 2011, Sinochem acquired Fujian Jianyang Kings Fluoride Industry Co., Ltd and China Kingstone Mining Holdings Limited, further strengthening the control on fluorite resources.

As a subsidiary of China Shen Zhou Mining & Resources, Inc., Inner Mongolia Xiangzhen Mining Group Co., Ltd. owns the mining rights in the Sumoqagan Obo Fluorite Ore District, Inner Mongolia, of which the total fluorite reserves reaches 7.26 million tons. With annual mining capacity of 300 kilotons, annual ore processing capacity of 200 kilotons and the ore grade of fluorite concentrates up to 98%, in 2010, Xiangzhen Mining produced 36,000 tons of fluorite lumps, as well as 24,000 tons of fluorite concentrates.

Do-Fluoride Chemicals Co., Ltd. is the world's largest fluoride salt manufacturer, mainly producing cryolite, aluminum fluoride and other inorganic fluorides. In H12011, it increased capital in Xinfu Mineral Industry, Jinfeng Mining, Huixin Mining and Sanyi Mining, whose fluorspar powder will be wholly sold to Do-Fluoride; in addition, it acquired a 40% stake of Jingchang Fluorite Co., Ltd. and a 30% stake of Jinlai Mining Co., Ltd., which separately own 1.1 million tons and 663 kilotons of fluorite ore resources.

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