METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include NBS (National Bureau of Statistics of China), China Nonferrous Metals Association, and USGS etc.
Abstract

In 2010, the primary magnesium output of China increased by 30.3% year-on-year to 653,800 tons. However, the eurozone debt crisis and global economic slowdown in 2011 imposed a negative impact on the primary magnesium output of China, with the figure hitting 660,600 tons, a slight year-on-year growth by 1%.

In 2012, China launched the 12th Five-Year Development Planning on New Material Industry which explicated to accelerate the preparation of magnesium alloy and the development of deep processing technologies, in a bid to promote its application in auto parts and track train industries. As estimated, China will realize the production capacity of 150,000 ton of high-strength magnesium alloy die-casting and profiles & plates by 2015. The proposal of the Planning is favorable to domestic key magnesium and magnesium alloy producers.

Among the players in Chinese magnesium industry, Nanjing Yunhai Special Metals is the professional magnesium alloy producer, while others including Taiyuan Tongxiang Magnesium, Yinguang Magnesium Industry Group, Ningxia Hui-ye Magnesium and Taiyuan Yiwei Magnesium Industry (Group) all focus on the production of primary magnesium and also produce downstream magnesium products such as magnesium alloy, magnesium powder and magnesium extrusions.
Nanjing Yunhai Special Metals is the largest professional manufacturer of magnesium alloys in China, with the capacity reaching 135,000 tons in 2011. In H1 2011, the company’s revenue from magnesium alloy business registered RMB509 million. In 2011, Nanjing Yunhai Special Metals began the construction of 100,000-ton magnesium alloy project. The phase I project is set to realize 50,000 tons capacity and is expected to be put into production in mid-2012; and the phase II project, with the capacity of 50,000 tons, is projected to be put into production by 2013. After the project is fully completed, the magnesium alloy capacity of the company will arrive at 235,000 tons.

Taiyuan Tongxiang Magnesium is the largest primary magnesium manufacturer in China, with the capacity recording 150,000 tons and output rising 5.38% YoY to 73,400 tons in 2010, both ranking the industrial top.

The report sheds light on global overview of magnesium industry, Chinese supply & demand, competition pattern, prices, export of magnesium products, development status of magnesium alloy industry of China and the operation of 11 leading manufactures including Nanjing Yunhai Special Metals.
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