



China Tin Industry Statistics, 2011

Mar. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

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

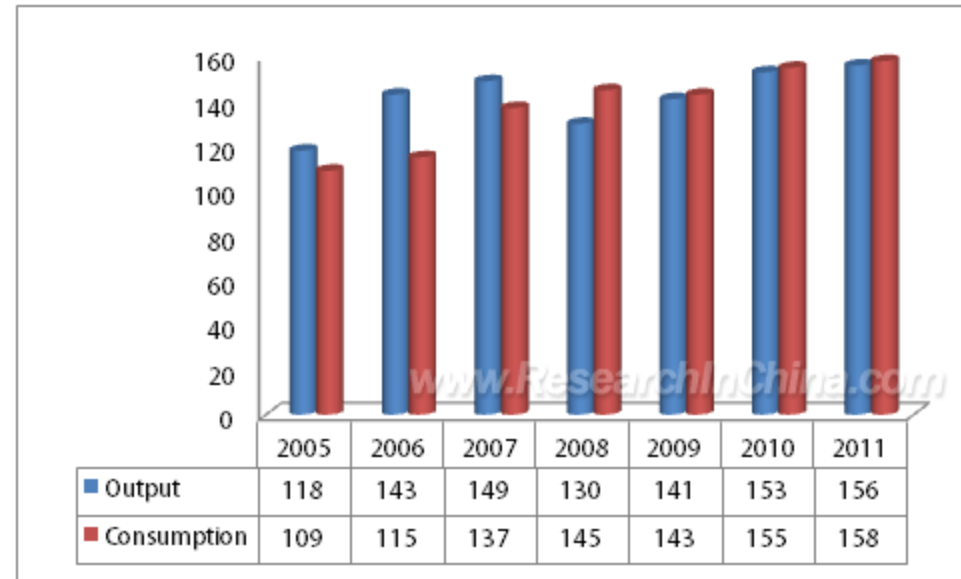
The primary information sources include National Bureau of Statistics of China and Wind etc .

Abstract

The tin resource worldwide features concentrated distribution, especially in Asian countries, followed by South America. In 2011, the tin concentrate output of China, Indonesia, Peru, Bolivia and Australia accounted for 90.13% of the world's total, and that of single China occupied 41.95% of the global total.

In 2001-2011,, China experienced the most rapid growth in terms of tin consumption, with a CAGR of 9.4%. In 2011, the tin consumption of China increased by 1.94% year-on-year to 158,000 tons; and the consumption of refined tin in China made up 42.13% of the globe total in 2011.

Output and Consumption of Tin in China, 2005-2011 (Unit: kt)



Source: NBS; ResearchInChina 'China Tin Industry Statistics, 2011'

Protective mining of tin resources and export quota system are adopted in China. On the one hand, China rarely exports tin concentrate; on the other hand, the export of refined tin is restricted by the quota management and levied with tariff. In the first ten months of 2011, the accumulated export volume of refined tin made up less than 1% of the total output, while the accumulated import volume accounted for around 12% of the total output. Therefore, China's demand for tin ingot rests on self-supply and marginal import.

In 2011, both the tin ore mining & dressing industry and tin smelting industry of China maintained the upward mobility as they did in 2010, which was mainly powered by the tight supply in tin market and the all-round recovery of demand from downstream sectors. By comparison, the tin ore mining and dressing industry upstream far outperformed the tin smelting industry downstream when it comes to the profitability. As of November 2011, the gross margin of tin ore mining & dressing industry of China realized 33.81%, while that of tin smelting industry was no more than 17.99% in the same period.

As for the price, due to the vigorous demand in the global tin market, the tin price kept rising in H1 2011. On April 15, the LME tin spot price set a new record high up to USD33,000/ton before it plummeted to USD18,550/ton at the end of 2011, falling 43.79% within eight months. It is worth noting that the tin price has been presenting an upward trend since 2011. In 2011, the LME tin spot price decreased by 27.35%, while the domestic tin price increased by 2.13%.

Preface

1 Demand and Supply in Global and China Tin Market

1.1 Supply and Demand Worldwide

1.2 Supply and Demand in China

2 Operation of Chinese Tin Industry

1.1 Tin Ore Mining and Dressing Industry

1.2 Tin Smelting Industry

3 Importation of Chinese Tin Industry

2.1 Data on Import and Export Volume

2.2 Data on Import Volume by Country

4 Prices of Tin in Chinese Market

- 
- Tin Ore Output Worldwide, 1994-2011
 - Tin Ore Output in Indonesia, 1994-2011
 - Tin Ore Output in Peru, 1994-2011
 - Tin Ore Output in Brazil, 1994-2011
 - Tin Ore Output in Russia, 1994-2011
 - Refined Tin Output Worldwide, 2005-2011
 - Tin Consumption Worldwide, 2004-2011
 - Tin Ore Output in China, 1994-2011
 - Tin Content of Tin Ores Dressing Products in China, 2011 (by Month)
 - Tin Output of China, 2005-2011
 - Tin Output in China, 2005-2011
 - Number of Tin Ores Mining and Dressing Enterprises in China, 2008-2011
 - Total Assets of Chinese Tin Ores Mining and Dressing Industry, 2008-2011
 - Total Liabilities of Chinese Tin Ores Mining and Dressing Industry, 2008-2011
 - Operating Revenue (Accumulated) of Chinese Tin Ores Mining and Dressing Industry, 2008-2011
 - YoY Change in Total Profit of Chinese Tin Ores Mining and Dressing Industry, 2007-2011 (by Quarter)
 - Operating Cost (Accumulated) of Chinese Tin Ores Mining and Dressing Industry, 2008-2011
 - Operating Expenses (Accumulated) of Chinese Tin Ores Mining and Dressing Industry, 2008-2011
 - Tax and Associate Charge (Accumulated) of Chinese Tin Ores Mining and Dressing Industry, 2008-2011
 - Financial Expense (Accumulated) of Chinese Tin Ores Mining and Dressing Industry, 2008-2011
 - Administrative Expense (Accumulated) of Chinese Tin Ores Mining and Dressing Industry, 2008-2011
 - Accounts Receivable (Net) of Chinese Tin Ores Mining and Dressing Industry, 2008-2011
 - Finished Products of Chinese Tin Ores Mining and Dressing Industry, 2008-2011
 - Average Balance of Current Assets of Chinese Tin Ores Mining and Dressing Industry, 2008-2011
 - Per-capita Sales (Accumulated) of Chinese Tin Ores Mining and Dressing Industry, 2008-2011

- Average Number of Employees in Chinese Tin Ores Mining and Dressing Industry, 2008-2011
- Assets-Liabilities Ratio of Chinese Tin Ores Mining and Dressing Industry, 2008-2011
- YoY Change in Gross Margin of Chinese Tin Ores Mining and Dressing Industry, 2007-2011 (by Quarter)
- Number of Tin Smelting Enterprises in China, 2008-2011
- Total Assets of Chinese Tin Smelting Industry, 2008-2011
- Total Liabilities of Chinese Tin Smelting Industry, 2008-2011
- Operating Revenue (Accumulated) of Chinese Tin Smelting Industry, 2008-2011
- Total Profit (Accumulated) of Chinese Tin Smelting Industry, 2008-2011
- Operating Cost (Accumulated) of Chinese Tin Smelting Industry, 2008-2011
- Operating Expense (Accumulated) of Chinese Tin Smelting Industry, 2008-2011
- Tax and Associate Charge (Accumulated) of Chinese Tin Smelting Industry, 2008-2011
- Financial Expense (Accumulated) of Chinese Tin Smelting Industry, 2008-2011
- Administrative Expense (Accumulated) of Chinese Tin Smelting Industry, 2008-2011
- Accounts Receivable (Net) of Chinese Tin Smelting Industry, 2008-2011
- Finished Products of Chinese Tin Smelting Industry, 2008-2011
- Average Balance of Current Assets of Chinese Tin Smelting Industry, 2008-2011
- Per-capita Sales of Chinese Tin Smelting Industry, 2008-2011
- Average Number of Employees in Chinese Tin Smelting Industry, 2008-2011
- Assets-Liabilities Ratio of Chinese Tin Smelting Industry, 2008-2011
- Gross Margin of Chinese Tin Smelting Industry, 2008-2011
- Unwrought Tin and Tin Alloy Export Volume (Accumulated) in China, 2008-2011
- Unwrought Tin and Tin Alloy Export Value (Accumulated) in China, 2008-2012
- Tin Ore Sand and Concentrate Import Volume of China, 2011-2012 (by Month)

- Refined Tin Import Volume (Accumulated) of China, 2008-2011
- Refined Tin Import Volume (Accumulated) of China from Indonesia, 2008-2012
- Refined Tin Import Volume (Accumulated) of China from Malaysia, 2008-2012
- Refined Tin Import Volume (Accumulated) of China from Indonesia, 2008-2012
- Refined Tin Import Volume (Accumulated) of China from Bolivia, 2011-2012
- Refined Tin Import Volume (Accumulated) of China from South Korea, 2008-2012
- Refined Tin Import Volume (Accumulated) of China from Thailand, 2008-2012
- Refined Tin Import Volume (Accumulated) of China from Japan, 2008-2012
- Refined Tin Import Volume (Accumulated) of China from USA, 2008-2011
- Tin Ore Sand and Concentrate Import Volume (Accumulated) of China from Bolivia, 2011-2012
- Tin Ore Sand and Concentrate Import Volume (Accumulated) of China from Burma, 2011-2012
- Tin Ore Sand and Concentrate Import Volume (Accumulated) of China from Laos, 2010-2011
- Tin Ore Sand and Concentrate Import Volume (Accumulated) of China from Mexico, 2009-2011
- Tin Ore Sand and Concentrate Import Volume (Accumulated) of China from Kazakhstan, 2008-2010
- Spot Price of LME Tin, 2009-2012
- Daily Average Price of Tin in Changjiang Non-ferrous Metal Stock Market, 2008-2012
- Daily Average Price of 1# Tin in Shanghai Metal Exchange Market, 2008-2012
- Monthly Average Price of Spot Tin Ingot in Shanghai Metal Exchange Market, 2011-2012
- Weekly Tax-inclusive Price of 1# Tin in Dalian, 2009-2012
- Weekly Tax-inclusive Price of 1# Tin in Beijing, 2009-2012
- Weekly Tax-inclusive Price of 1# Tin in Guangzhou, 2009-2012
- Weekly Tax-inclusive Price of 1# Tin in Shanghai, 2009-2012
- Weekly Tax-inclusive Price of 1# Tin in Xi'an, 2009-2012
- Weekly Tax-inclusive Price of 1# Tin in Zhengzhou, 2009-2012

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