



China Antimony Industry Report, 2011-2012

Apr. 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

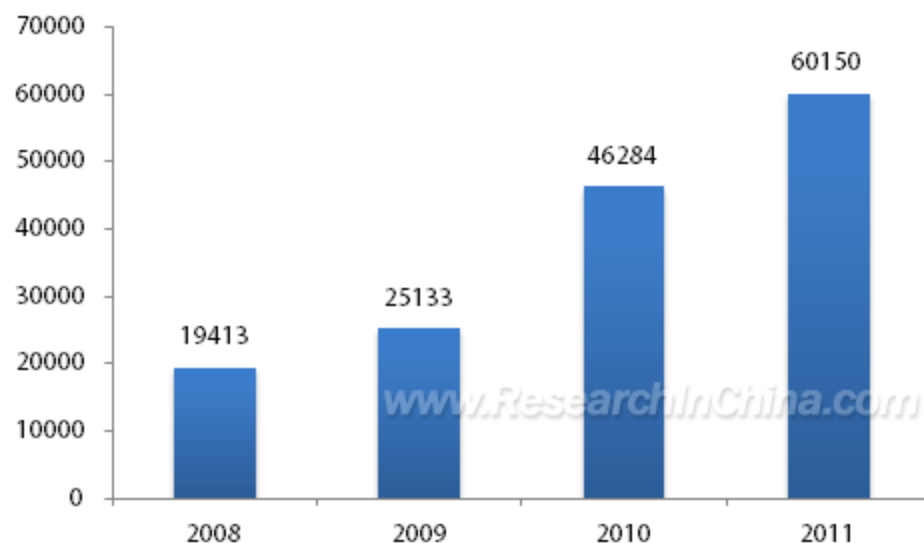
The primary information sources include National Bureau of Statistics of China, China Customs and Wind etc .

Abstract

Antimony is a rare metal. In 2011, the global antimony ore reserves reached 1.80 million tons, while the static reserve production ratio is only 12.4 years, so the supply of antimony ore raw material will be tight. China has the world's most abundant antimony ore reserves, but it still has a large gap in the supply of antimony ore raw materials. The antimony ores produced by Russia, Bolivia, Tajikistan and other antimony giants are mainly exported to China.

Seen from the pattern of the global antimony industry, antimony product output of China has long accounted for over 90% of the world's total. In recent years, the growth of antimony product output worldwide mainly comes from China. As antimony is increasingly applied to flame retardants, lead-acid batteries and other downstream areas, China has become the world's largest antimony consumer.

Import Volume of Antimony Ores and Concentrates in China, 2008-2010 (Unit: ton)



source: China Customs, ResearchInChina: China Antimony Industry Report, 2011-2012

The tight supply of antimony ore raw materials is a key hindrance to the development of Chinese antimony industry. In 2011, antimony ore concentrate output of China declined for the second consecutive year, just hitting 120,800 tons, down 4.9% year-on-year. In this case, China's antimony ore import volume continued to grow. In 2011, China imported 60,150 tons of antimony placers and concentrates, 3,214 tons of antimony oxide, 492 tons of antimony metal and products. China antimony industry has been more dependent on the overseas mineral raw materials.

To address the disorderly development of antimony ore resources in China, China has enhanced rectification in Lengshuijiang and other regions where the antimony ore reserves concentrate; the shutdown of a large number of small and medium-sized antimony ore manufacturing enterprises is conducive to the rising the market concentration degree of Chenzhou Mining, Flash Star Antimony and other leading players.

In Chinese antimony industry, key companies include Flash Star Antimony, Chenzhou Mining, Muli Antimony, SUNSTAR Metal Chemical and so on. Flash Star Antimony and Chenzhou Mining are the world's first and second largest antimony oxide production enterprises respectively.

In 2011, total revenue of Chenzhou Mining rose by 41.76% from a year earlier, and the operating profit grew by 118.15% year on year. In 2011, Chenzhou Mining conducted trial production of a new 15,000-ton antimony oxide production line; and a 5,000-ton refined antimony expansion project commenced as well. During 2012-2013, the processing capacity of antimony products of Chenzhou Mining will be raised by 100%.

The report covers:

- Characteristics, status quo and related policies of Chinese and global antimony industry;
- Analysis on Investments in Chinese and global antimony industry;
- Import, export, import & export quotas of antimony and its products in China;
- Operation, development, investment and sales of antimony and antimony product manufacturers (including Hunan Chenzhou Mining Group, Hunan Nonferrous Metals Corporation Limited, and Guangxi China Tin Group).

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- 1.2 Industry Chain

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- 2.2 Supply
- 2.3 Demand

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 - 3.3.1 Scale
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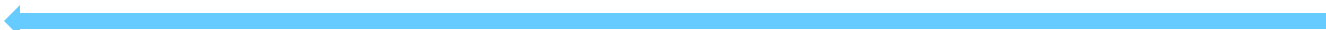
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