



# China Germanium 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 USGS, China Customs and China Nonferrous Metals Industry Association etc .

## Abstract

America has the world's richest germanium ore resource, but its germanium output has long been showing a small scale. By contrast, China is the largest germanium producer and exporter around the globe. In 2011, the reserves of germanium ore resources in America and China accounted for 45% and 41%, respectively, while their output of germanium (metal tons) made up 2.9% and 65.5% worldwide.

When it comes to China's germanium industry, China has launched a series of favorable policies to shore up the development of high-end germanium products. For instance, China levies 5% tariff on the export of germanium dioxide products; deep-processing germanium products such as monocrystalline germanium slices and germanium optical components can enjoy preferential export tax rebate by 17% and 15%. Under such policy climate, industrial tycoons including Yunnan Lincang Xinyuan Germanium Industry, Yunnan Chihong Zinc & Germanium and China Germanium developed new capacity projects centering on germanium deep-processing products.

### Export Tariff Rate of Germanium-based Products in China, 2012

Products	2012
Germanium Dioxide	-5%
Zone-Melting Germanium Ingot	5%
Germanium Monocrystal	5%
Germanium Optical Component	15%
Solar Cell Monocrystalline Germanium Slices	17%

Source: China Customs; ResearchInChina, China Germanium Industry Report, 2011-2012

Yunnan Lincang Xinyuan Germanium Industry is the only listed company that specializes in germanium products. It has the most complete germanium industry chain with the largest recoverable deposits of germanium metal. In 2011, the ongoing projects of the company concentrated in germanium deep-processing products consisting of solar cell monocrystalline germanium slice, optical fiber germanium tetrachloride, infrared germanium optical lens, etc.

CNGC Night-Vision Science & Technology Group bears distinct competitive advantages in military and civil infrared product fields. As of 2010, the company realized the annual capacity of 20 tons of infrared optical germanium monocrystals and 100,000 sets of infrared optical components.

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