



**Global and China Molybdenum 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 International Molybdenum Association, China Customs, WIND and China Nonferrous Metals Industry Association etc .

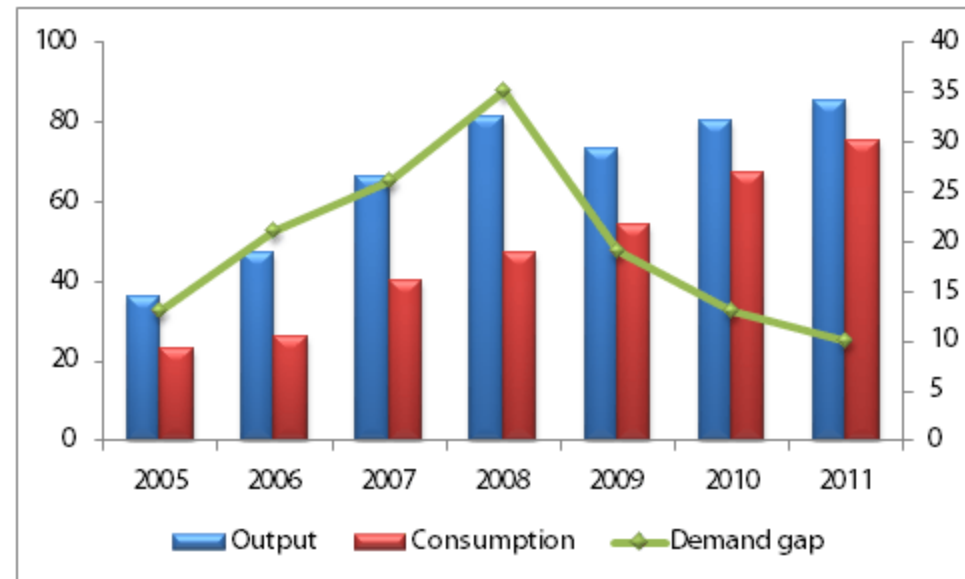
Abstract

In 2011, molybdenum demand showed rapid growth; and global molybdenum market saw the growing balanced supply and demand. In the same year, China produced 85 kilotons of molybdenum, accounting for 34.1% of the world's total; and consumed 75 kilotons, taking 31.0% of global total. China remained as the largest molybdenum producer and consumer across the world.

At present, Chinese molybdenum industry is featured as follows:

Concerning supply and demand, the output and consumption of molybdenum in China presented a high-speed growth from 2005 to 2010, characterizing oversupply as a whole. After 2008, demand gap was narrowed as molybdenum consumption had a higher growth rate than molybdenum output.

Output and Consumption of Molybdenum in China, 2005-2011
(Unit: kiloton)



Source: ResearchInChina, Global and China Molybdenum Industry Report, 2011-2012

As for import and export, affected by industry access system and import/export quota system, Chinese molybdenum products are at variance in price with foreign ones, which influences import and export volume of Chinese molybdenum products. In 2009, China became a net molybdenum importer due to surged import volume and slump export volume of molybdenum products affected by the inverted prices at home and abroad.

In terms of product mix, the deep-processed products with high added value take a small portion among Chinese molybdenum products, and the product mix shall be upgraded. At present, Chinese molybdenum products are also dominated by primary products such as ferromolybdenum and roasted molybdenum concentrate, etc.; and deep-processed products including molybdenum chemicals, molybdenum metal products and the like just occupy 30% or so.

By enterprises, those with products covering the whole industry chain or upstream industry chain enjoy high profitability; and those in downstream industry chain show lower profitability.

As giants in molybdenum industry, Jinduicheng Molybdenum Stock Co., Ltd. and Luoyang Molybdenum Industry Company own their own mines, with high self-sufficiency rate of resources and their products covering the entire industrial chain; the superiorities of which make for high gross margin of products and higher profitability. In 2011, Luoyang Molybdenum Industry Company achieved operating revenue and net income of RMB6.1 billion and RMB1.16 billion respectively, and its net profit margin was 19.0%.

Due to low self-sufficiency rate of resources, products of Xinhualong Molybdenum Industry and Wanxin Tungsten-Molybdenum etc. are mainly pooled in smelting products and downstream molybdenum products. The companies have lower profitability in spite of higher output. In 2011, operating revenue and net income of Xinhualong Molybdenum Industry were RMB3.374 billion and RMB91 million separately; and its net profit margin was merely 2.7%.

In addition, companies represented by Daheishan Mining Industry possess abundant molybdenum ore resources, but with deficient smelting and processing capacity; their products focus on upstream industry chain; such group of players also boasts high profitability. In 2011, Daheishan Mining Industry achieved operating revenue RMB336 million and net income RMB66 million, respectively, with the net profit margin of 19.6%.

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