



**Global and China Tantalum Industry Report,
2011**

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 information sources include WIND and China Customs.

Abstract

As a kind of minor metal, tantalum finds very wide application. About half of the world's tantalum resources are applied in capacitor.

The report highlights the following aspects:

- Reserves, output and price of tantalum ore worldwide; ongoing and expansion projects;
- Status quo of China tantalum industry, import & export, price and key applications;
- Chinese tantalum capacitor market and downstream consumption filed;
- Two world's leading tantalum manufacturers and seven major China based tantalum and ore producers.

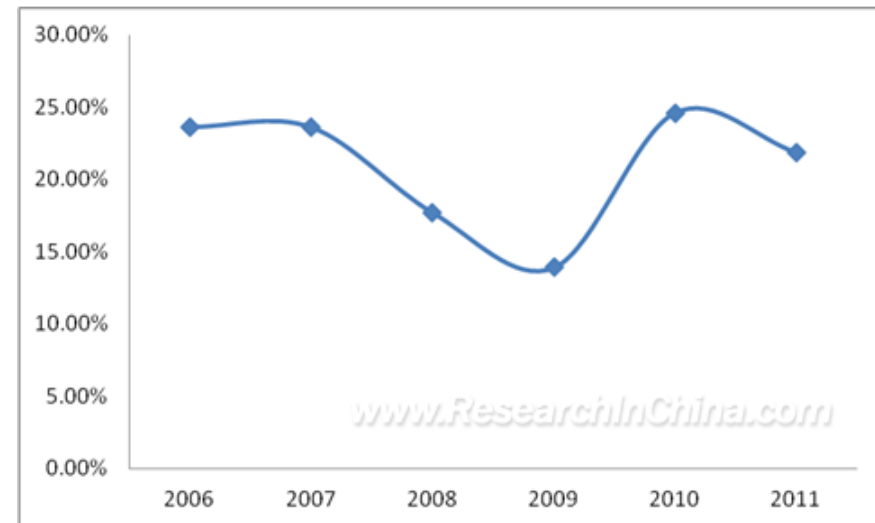
In 2010, the global output of tantalum ores reached 805 tons. In particular, the output of Brazil, as the world's largest tantalum ore producer, accounted for 22.4% of the world's total; while China had low output of tantalum concentrates, making up no more than 8% of the global total. As China imports 80% tantalum raw materials to meet its consumption, domestic tantalum processing businesses are mostly restricted by the uncertainty of raw material supply from overseas market.

For Ningxia Orient Tantalum Industry, as one of the leading tantalum manufacturers in the world, the global market occupancy of capacitor-grade tantalum powder exceeds 25%, while that of capacitor tantalum wire surpasses 60%. Ningxia Orient Tantalum Industry is almost fully reliant on the external purchase to meet its demand for tantalum raw materials, if the 20% contributed by the joint-stock project Ta-Nb mine in Nanping, Fujian province is excluded.

Ningxia Orient Tantalum Industry establishes long-term cooperative relationship with Yichun Tantalum & Niobium Mine, the largest mine in China; also, it inked long-term deal with the large Ta-Nb mine in South America, and with Africa-based small-sized Ta-Nb mine as supplement of spot supplies.

Generally speaking, the raw material source of Ningxia Orient Tantalum Industry can be primarily guaranteed. However, due to the fact that the company doesn't possess its own mines, it is hard to keep the cost under control. As a result, it was forced to bear high risk in case of the short supply of raw materials. For example, the gross margin from the tantalum product business of the company in 2009 was just 13.9%.

Gross Margin of Tantalum Products of Ningxia Orient Tantalum Industry, 2006-2011



Source: Ningxia Orient Tantalum Industry; ResearchInChina, Global and China Tantalum Industry Report, 2011

Presently, the Australia-based GAM features more competitive industry chain. GAM involving in the exploitation of tantalum ore announced in August 2011 to take over the tantalum processing plant under America-based Cabot, an international tycoon in the tantalum smelting field.

The report sheds lights on the tantalum ore reserves and key companies in China and beyond. Also it analyzes the tantalum electrolytic capacitor industry of China. As a very important component, tantalum electrolytic capacitor is commonly used in mobile phone (35%), digital camera (34%) and notebook computer (16%). The short renewal cycle of electronic products is bound to spur the consumption of tantalum capacitor.

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