



**Global and China Nickel Industry Report,
2011-2012**

May 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 NBS(National Bureau of Statistics of China), and China Nonferrous Metals Association etc.

Abstract

Due to the nickel projects of Anglo American' Barro Alto and VALE's Onca Puma being put into production as well as China's increased output of nickel pig iron, the global nickel output saw a year-on-year increase of 10.0% to 1.589 million tons in 2011, with the consumption rising 6.9% YoY to 1.572 million tons. In 2012, the successive putting into production of the nickel projects worldwide as well as the releasing of new capacities will pose the mounting pressure on nickel oversupply, with the estimated excess hitting 50,000 tons.

As opposed to the global demand-supply pattern, the nickel of China has long been witnessing short supply. In 2011, the stainless steel output of China surged by 11.9% year-on-year, greatly facilitating consumption of nickel. Subsequently, the nickel consumption worldwide increased by 17.1% year-on-year, far ahead of the global consumption growth rate in the corresponding period. In the meantime, China's nickel output also witnessed skyrocketing growth. And nickel pig iron output presented the most rapid growth. In 2010, the nickel output of China reached 326,000 tons, among which, the nickel pig iron output amounted to 161,000 tons, exceeding the electrolytic nickel

And nickel pig iron ranked the first in terms of output of all nickel-based products in China. In 2011, China nickel output approximated 446,000 tons, with the proportion of electrolytic nickel and nickel pig iron registering 41.5% and 56.5%, respectively.

In recent years, the nickel pig iron market of China has experienced robust growth, which largely contributes to the following aspects: firstly, stainless steel businesses consumer more and more nickel pig iron with the proportion for some as high as 50% or more; secondly, nickel pig iron smelting technology advances. Presently, the advanced and environment-friendly RKEF technology has been popular in the nickel pig iron industry and became the mainstream.

For China, nearly all the demand for laterite nickel ore in the production of nickel pig iron is imported from other countries. In 2011, China's import of nickel ore sands and concentrates from Indonesia, the Philippines and Australia accumulatively amounted to 48.056 million tons, up 92.4% from a year earlier, in particular, laterite nickel ore made up over 98%.

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In 2012, Indonesia officially announced to levy 20% export tariff on 14 kinds of raw ore including nickel from May 6 on, a move will shrink the supply of laterite nickel ore in China while pushing the nickel price up.

As a substitute for metallic nickel, the nickel pig iron price is subject to the nickel price of LME. In 2011, the nickel price of LME plunged, and domestic nickel price showed a downward mobility. In particular, the prices of nickel pig iron with medium and high content of nickel declined to a varied extent, whereas, the price of nickel pig iron with low content of nickel increased due to the growing demand from 200 series stainless steel.

The report focuses on nickel demand & supply, nickel price trend and nickel pig iron market in China and beyond. Also, it highlights four international tycoons, such as Norilsk Nickel and Sale SA, as well as seven key China-based manufactures such as Jinchuan Group Co., Ltd., Jinlin Ji En Nickel Industry Co., Ltd., Xinjiang Xinxin Mining Industry Co., Ltd., etc.

Jinchuan Group Co., Ltd is the largest nickel manufacturer in China, with the output in 2011 hitting 130,000 tons, ranking global No.3.

Jinlin Ji En Nickel Industry Co., Ltd is not only China's second largest nickel manufacturer, but also the country's largest nickel salt producer, mainly involved in the production of electrolytic nickel and nickel sulfate, with the combined revenue in 2011 accounting for 62.85% of the total.

Xinjiang Xinxin Mining Industry Co., Ltd. boasts abundant nickel ore resources. In 2011, the nickel metal amount hit 572,600 tons, and its electrolytic nickel output registered 8,128 tons, making up 4.4% of China's total.

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