

Global and China Lithium Carbonate Industry Report, 2011-2012

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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 costeffective 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 USGS etc.

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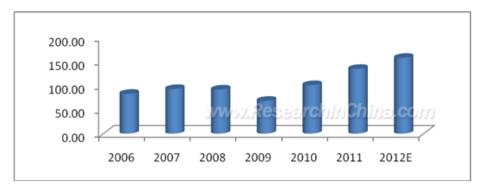
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Abstract

After 2010, lithium carbonate industry gradually recovered from the impact of global financial crisis and entered a new stage of rapid development. Global demand for lithium carbonate reached 135 kilotons in 2011, a YoY rise of 33.5%. Among lithium carbonate products, battery grade lithium carbonate becomes a hot investment product in the industry with the fastest growth rate in demand.

Global Lithium Carbonate Demand, 2006-2012 (Unit: kiloton)



Source: ResearchInChina, < Global and China Lithium Carbonate Industry Report, 2011-2012>

In 2011, global lithium carbonate supply still remained under the control of three giants SQM, FMC and Chemetall (Rockwood Lithium) in the industry; however, they saw limited growth rate in lithium carbonate output; and there was a supply gap of 11 kilotons in global lithium carbonate market. Under such background, more and more new entrants (dominated by lithium ore enterprises) got involved in lithium carbonate industry. Being advantageous in raw material cost due to abundant lithium ore resources and being optimistic about the development prospect of lithium battery industry in the future as well as relatively low cost superiority in the production of battery-grade lithium carbonate from lithium based on ore extraction, the enterprises started to build lithium carbonate production capacity; and their products were dominated by battery-grade lithium carbonate.

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In the same period, Chinese lithium carbonate market also saw robust demand; particularly, the increased demand on lithium battery in China stimulated the ever rising demand for lithium carbonate after the rectification of lead-acid battery industry. Among China's lithium carbonate producers, brine-based lithium extracting enterprises were fatigue to release production capacity under the impact of weather, technology and production halt for overhaul etc. Affected by this, Chinese lithium carbonate market is in tight supply, and the supply gap hit 3 kilotons throughout 2011. The tight supply of lithium carbonate in China is expected to be eased in 2012 under the influence that ore-based lithium extracting enterprises gradually expanded their production capacity; particularly, Zhangjiagang project of Galaxy Resources was gradually put into production.

At present, lithium ores of China's ore-based lithium extracting enterprises are mainly imported from Australia. They are highly dependent on imported ores owing to scarce ore resources. Australian mining enterprises like Talison have started to set foot in lithium carbonate business in recent years, and its ores are mainly supplied to self-owned lithium carbonate producers. In the long term, it will influence the raw material supply of China's ore-based lithium extractors so as to depress China's lithium carbonate output.

Besides the development of global and Chinese lithium carbonate industries, this report also focuses on the development of lithium carbonate businesses in 10 foreign companies like SQM, FMC, Rockwood, WLC Sentient, Simbol, Orocobre, Nordic Mining, Talison Lithium and Galaxy etc. and 13 Chinese counterparts such as Sichuan Tianqi Lithium Industries Inc., Jiangxi Ganfeng Lithium Co., Ltd., CITIC Guoan Group and Tibet Mineral Development Co., Ltd. etc.

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As the largest brine-based lithium extracting enterprise in China, CITIC Guoan Group's actual lithium carbonate production capacity has been far below than the designed capacity all the time owing to technical limitation. In 2011, CITIC Guoan Group saw decline in both brine yield and raw ore output affected by the floodwaters in the previous two years; coupled with the production halt for overhaul, its lithium carbonate output increased slightly and continued to maintain about 5 kilotons.

Sichuan Tianqi Lithium Industries Inc. is the biggest ore-based lithium extractor at home. Its lithium carbonate production capacity reached 8 kilotons (up 45.5% YoY) in 2011 as the newly-built lithium carbonate project was completed and put into production. The company's total output and sales volume of lithium carbonate registered 7,957.93 tons and 8,731.62 tons respectively throughout 2011, with the YoY growth rates of 38.7% and 58.1% separately.

As the largest metallic lithium provider in the world, the lithium carbonate business of Jiangxi Ganfeng Lithium Co., Ltd has witnessed rapid development in recent years, with the annual production capacity increasing from 500 tons in 2008 to 3,000 tons in 2011.

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4.2 Export

4.3 Import & Export Distribution

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