



Global and China Sodium Metal Industry Report, 2012

Nov. 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 China Customs, and Wind Information etc.

Abstract

Since the sodium metal industry features high energy consumption, manufacturers in developed countries halt the production, including such industrial leaders as America-based Dupont, France-based Masa and some Russia-based producers. In China, by contrast, major sodium metal enterprises are expanding their capacities and, many start-ups emerge, helping worldwide sodium capacity be transferred to China in phases. Currently, the sodium metal capacity of China has exceeded 100,000 tons, more than the market demand.

Capacities of Major Sodium Metal Manufacturers in China

Manufacturer	Capacity
Inner Mongolia Lantai Industrial Co., Ltd	45,000 t/a
Wanji Holding Group Co., Ltd	22,500 t/a
Ningxia Yinchuan Sodium Factory	4,000 t/a
Yinchuan Jingying Fine Chemistry Co., Ltd	3,500 t/a
Zunbao Titanium Co., Ltd	10,000 t/a (Still not put into production)

Source: ResearchInChina *Global and China Sodium Metal Industry Report, 2012*

China is not only a big producer of sodium metal, but also a big consumer. In 2006, the demand for sodium metal in China hit 82,000 tons, and then in 2010 the figure was close to 100,000 tons. China's demand for sodium metal is expected to drive up due to the increasing consumption worldwide as well as the skyrocketing development of domestic atomic energy industry.

By application, sodium metal is principally applied in indigo fuel, pharmaceuticals, pesticide, rare and precious metal smelting and nuclear industries. In particular, Indigo fuel is the key consumer, consuming 60% of sodium metal.

The development of nuclear power industry has in recent years fueled the demand for nuclear-grade sodium which features higher specific heat than vast majority of metals and good thermal insulation properties and serves as an ideal coolant for fast reactors. Thus far, fast reactors worldwide in service, including Phenix, Super-Phenix, Russian BN-600 and Chinese CEFR, all employ nuclear-grade sodium as coolant.

It is expected that the demand for nuclear-grade sodium will show explosive growth with the application of the fourth generation nuclear power technology. In the upcoming three to five years, the demand for nuclear-grade sodium will mainly be contributed by two fast reactors- Fujian Sanming and Russian BN-1200, with the targeted demand hitting 8,000 tons and 6,000 tons, respectively.

Inner Mongolia Lantai Industrial, the sole Chinese company with nuclear-grade sodium production technology, has provided roughly 350 tons of nuclear-grade sodium for CEFR.

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