



China Copper Processing Material Industry Report, 2012

Jan. 2013

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 Company Reports, and National Bureau of Statistics of China etc.

Abstract

As the intermediate link of copper industry chain, copper processing materials are widely used in electricity, electric, transportation, machinery manufacturing and other industries.

In recent years, with the rapid development of downstream industries, China's capacity, output and consumption of copper processing materials have all exceeded ten million tons mark, which makes it the world's largest copper processing material producing and consuming country. In 2011 the output attained to 10.282 million tons, accounting for over 50% of the global total; the consumption reached 10.563 million tons.

In January-October 2012, China's cumulative output of copper processing materials climbed 7.77% YoY to 9.871 million tons.

The Chinese copper processing material industry maintained a steady growth trend in 2011 against the global downturn and downstream consumption demand decrease, however, its growth slowed down sharply compared with previous years, of which, growth rates of output and consumption dropped by 11.7 and 12.8 percentage points over the last year, respectively. In 2012, China's copper processing material industry continued to maintain the momentum of low-price running.

In addition to analyzing the status of the copper processing material industry, China Copper Processing Material Industry Report, 2012 of

ResearchInChina also emphasizes five major categories of products such as copper plate and strip, copper pipe, etc.

As one of the main products of copper processing materials, Copper Plate and Strip has witnessed a rapid capacity expansion in recent years driven by investment demand, resulting in an oversupply of ordinary copper plate and strip products, while high precision copper plate and strip products still rely on imports.

Copper Pipe is an important net export product among copper processing materials. Affected by the shrinking international market as well as the U.S. anti-dumping sanctions, its net export volume witnessed a year-on-year decline of 11.0% in 2010, followed by a slight recovery in 2011, but then subjected to Brazil's anti-dumping sanctions in the coming November. Net export volume throughout the year rebounded by a small margin to 146,900 tons, of which, export and import volume were 172,000 tons and 25,100 tons, respectively.

Moreover, this report also makes analysis on 13 Chinese copper processing material manufacturers, involving Zhejiang Hailiang Co., Ltd., Zhejiang Honglei Copper Co., Ltd., Anhui Jingcheng Copper Share Co., Ltd., Chinalco Luoyang Copper Co., Ltd., China-Kinwa
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High Technology Co., Ltd., Jiangxi Copper Corporation, and so on.

Being the largest copper pipe exporter and the largest precision copper bar manufacturer in China, Zhejiang Hailiang Co., Ltd. focuses on the machining and trading of precision copper pipes. As of end-2011, the company's copper pipe capacity was 308,000 tons, including 166,000 tons of seamless copper pipes for refrigeration, 120,000 tons of copper and copper alloy pipes for construction / heat exchange, and 22,000 tons of copper alloy pipe fittings.

Anhui Jingcheng Copper Share Co., Ltd., China's leading producer of copper plate and strip, is mainly dedicated to the operation of brass series and tin-phosphor bronze series of copper-based alloy plates and strips. In 2011, the company's brass plate and phosphor bronze plate & strip sales reached RMB2930 million and RMB280 million, respectively. In January 2012, its 30,000 t/a High Precision Copper Plate and Strip Project officially went into operation. Following the advancement of this project, the company's product line will be further extended.

China-Kinwa High Technology Co., Ltd. as China's top-grade electrolytic copper foil manufacturer has two main copper foil subsidiaries, i.e. United Copper Foils (Huizhou) Ltd and Qinghai Electronic Material Industry Development Co., Ltd. In 2011, the latter's Xining (Phase I) Electrolytic Copper Foil Project released capacity

steadily, which encouraged a substantial increase in revenue of copper foil products, up to RMB552 million for the whole year, a year-on-year rise of 125.5%. The Xining (Phase II) 15,000 t/a High-grade Electrolytic Copper Foil Project is expected to be put into production in the second half of 2012, which will further enhance the company's performance in copper foil products.

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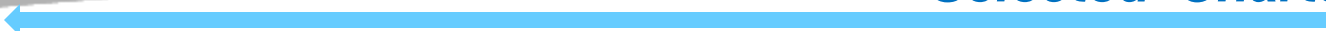
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