Global and China Titanium Industry Report, 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 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.

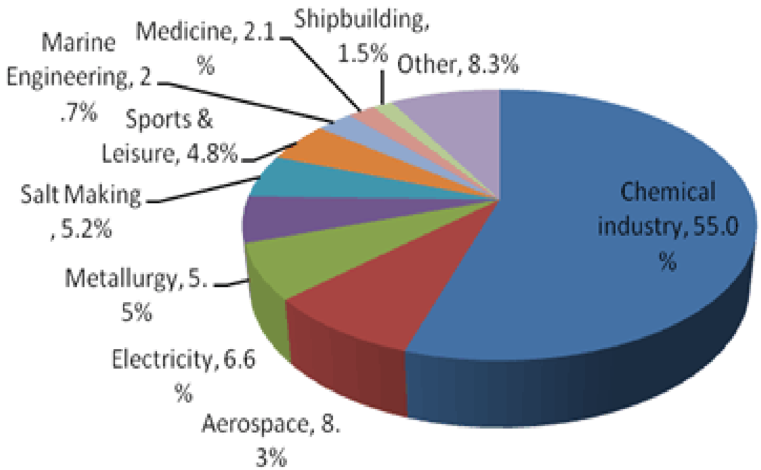
INFORMATION SOURCES

The primary information sources include Company Reports, China Customs, and National Bureau of Statistics of China etc.

Abstract

Currently, the United States, Japan, Russia and China are the world's leading producers and consumers of titanium. However, due to the different levels of industrial development, there exist some variations in the field of titanium consumption. Among them, approximately 60% of titanium in the US and Europe is utilized in the aerospace field; about 90% of Japanese titanium is applied in the industrial sector, while in China, 55% in the chemical field and 8.3% in the aerospace arena.

Titanium Consumption Structure in China (by Applications), 2011



Source: China Nonferrous Metals Industry Association Titanium Zirconium & Hafnium Branch; ResearchInChina *Global and China Titanium Industry Report, 2012*

Following the development of domestic chemical, aerospace, military and other industries, China's output of titanium mill has seen robust growth in recent years, surpassing the United States in 2010 to become the world's largest producing country of titanium mill. In 2011, China's output of titanium reached 50,962 tons, up 33.0% from a year earlier, making a record high.

In 2012, affected by the depressed global economic growth and China's economic growth recession, the demand from aerospace, chemical and other downstream sectors shrank, resulting in a slowdown in China's titanium production, and it is expected to be 52,700 tons throughout the year.

In addition to analyzing the development of titanium industry, Global and China Titanium Industry Report, 2012 of ResearchInChina also focuses on upstream industries such as titanium sponge, titanium ingot, etc., as well as key players like VSMPO-AVISMA, TIMET, Baoji Titanium Industry Co., Ltd., Western Metal Materials Co., Ltd., etc..

VSMPO-AVISMA is the world's largest titanium producer, of which, AVISMA is mainly responsible for the production of titanium sponge, while VSMPO is committed to the titanium production. Titanium capacity of the company reached 31,752 tons in 2011, with shipments of 25,402 tons, firmly ranking first worldwide.

As the largest titanium manufacturer in the United States, TIMET owns a complete industrial chain from titanium ore smelting to titanium processing. As of 2011, its titanium sponge, titanium ingot and titanium production capacities had hit 12,600 tons, 68,450 tons and 27,700 tons, respectively. 63% of the company's titanium products have found application in the aerospace field, 13% in the military field, 17% in the industrial and emerging markets.

As China's largest listed titanium company, Baoji Titanium Industry is subordinate to the Baoti Group Co., Ltd.. In 2011, its sales volume of titanium products achieved 18,312.8 tons, involving 11,925.1 tons of titanium; and its revenue climbed 13.9% YoY to RMB2.92 billion. Considering the declining climax index in the titanium market, the company's titanium sales volume in 2012 is expected to be roughly 11,800 tons, with total revenue of RMB2.2 billion or so.

Being the second largest titanium producer in China, Western Metal Materials realized titanium production of 4,921 tons in 2011, just behind Baoji Titanium Industry. As Chinese titanium mill is mainly for civil use, with numerous enterprises and intense competition, and to seek long-term development, the company is agrressively turning to the medium- and high-end product fields, already actively involved in the design and pilot production of China-made large aircraft titanium products.

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