



**Global and China Fluorite Industry Report,
2012-2014**

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, China Customs, and National Bureau of Statistics of China etc.

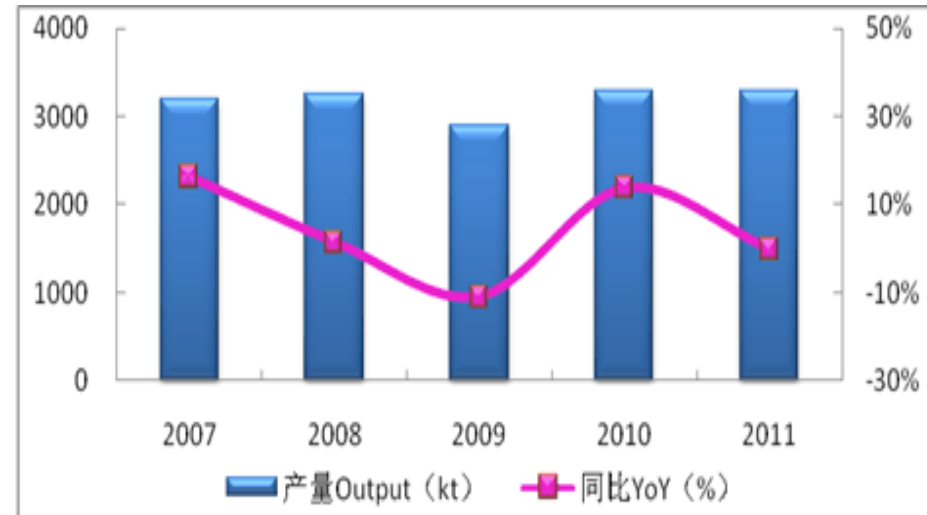
Abstract

Fluorite is an important mineral raw material in the modern industry, widely used in metallurgy, chemical industry, aluminum smelting and other fields. In 2011, the global fluorite reserves reached about 240 million tons, mainly distributed in South Africa, Mexico, China and Mongolia; the fluorite reserves of these four countries accounted for about 50% of the world's total reserves.

China, Western Europe and the United States are major fluorite consumers, accounting for about 80% of the total fluorite consumption. The United States and Western Europe mainly demand for acid fluorite which is mainly used in the production of hydrofluoric acid; in China, cement and glass industries generate the largest demand for fluorite, and the fluorite demand from the fluorine chemical industry is growing rapidly.

In 2011, the fluorite reserves approximated 24 million tons in China, mainly in Inner Mongolia, Jiangxi, Zhejiang, Hunan and Fujian provinces whose total reserves accounted for 80% of national total. China's fluorite reserves account for only 1/10 of the global total, but its output accounts for more than 50%, with serious over-exploitation. In recent years, China has introduced a variety of measures to protect fluorite resources, so the fluorite output has remained stable. China's fluorite output hit 3.3 million tons in 2011.

China's Fluorite Output and YoY Growth Rate, 2007-2011



Source: USGS; ResearchInChina *Global and China Fluorite Industry Report, 2012-2014*

In China, large fluorite production enterprises include Sinochem Lantian Co., Ltd., China Kings Resources Group Co., Ltd., Inner Mongolia Xiang Zhen Mining Group Ltd., Centralfluor Industries Group and Zhejiang Wuyi Shenlong Flotation Co., Ltd. With China's control on fluorite resources and integration of the fluorine chemical industry, some listed fluorine chemical companies (such as DO-Fluoride and Zhejiang Yongtai Technology) have set foot in the fluorite field.

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Sinochem Lantian Co., Ltd. is a leading Chinese fluorine chemical production enterprise with a complete fluorine chemical industrial chain. In 2012, Sinochem Lantian had 4 fluorite resource enterprises, with fluorite resources in Xingguo of Jiangxi, Chenzhou of Hunan, Jiayang of Fujian and other places. Now, it has owned more than 30 million tons of fluorite resource reserves.

Inner Mongolia Xiang Zhen Mining Group Ltd. is a subsidiary of China Shen Zhou Mining & Resources Inc. It has the mining right to explore the fluorite mine in Sumoqagan Obo, Inner Mongolia; the total fluorite reserves of the mine amount to 7.26 million tons. The annual mining capacity of Xiang Zhen Mining equals to 300,000 tons and the annual ore processing capacity reaches 200,000 tons; the fluorite concentrate grade is 98%. In addition, Xinyi Fluorite Co., Ltd. (located in Jingde, Anhui Province) which is a subsidiary of Xiang Zhen Mining has the mining permits for Qingzheng Xinyi Fluorite Mine and Xinglong Guangrong Fluorite Mine.

DO-Fluoride Chemicals Co., Ltd as one of the world's largest fluoride salt production enterprises is mainly engaged in the production and operation of cryolite, aluminum fluoride and other inorganic fluorides. In 2011, DO-Fluoride acquired 40% stake of

Jingchang Fluorite Co., Ltd. with 1.10 million tons of fluorite resources and 30% equity of Jinlai Mining Co., Ltd. with 663,000 tons of fluorite resources. In addition, DO-Fluoride increased investment in Xinfu Mining, Jinfeng Mining, Huixin Mining and Sanyi Mining, all the fluorite powder of which will be sold to DO-Fluoride.

The report includes the following aspects:

- Reserves, supply and demand in the global fluorite Industry;
- Reserves, supply, demand, competition pattern, import, export and price in China fluorite industry;
- Industrial policies of China fluorite industry, status quo and related policies of the extraction of fluoride from phosphorite;
- Operation and fluorite business of 3 overseas fluorite production enterprises;
- Operation, fluorite business and development trends of 8 fluorite production enterprises in mainland China.

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