



**Global and China Zirconium Industry
Report, 2012-2013**

Mar. 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 world's largest consumer of zircon sand, China is heavily dependent on imports due to the domestic limited resources, which restricts the development of Chinese zirconium product industry.

In 2012, China's zircon sand (including concentrates and tailings) import volume reached 78.01 tons, a year-on-year decrease of 12.16%; import price of zircon sand in the fourth quarter dropped by 27% compared to the first quarter. The continuously falling price is good news for Chinese zirconium products manufacturers.

In today's China, major zirconium products are still concentrated in traditional zirconium chemicals such as zirconium silicate and zirconium oxychloride, while concerning downstream zirconia composites and zirconium metal manufacturing, there still exist a big technology gap with foreign counterparts. In recent years, following the decline in market demand and profitability of traditional zirconium chemicals, the Chinese zirconium products industry is speeding up structural adjustment, leading players like Guangdong Orient Zirconic Ind Sci & Tech Co., Ltd., State Nuclear BaoTi Zirconium Industry Company, Jiangxi Kingan Hi-Tech Co.,Ltd are increasing investment in zirconia composites, nuclear-grade zirconium sponge and other high-end products, of which, nuclear-grade zirconium sponge will be a future focus in the industrial development.

Existing Nuclear-grade Zirconium Sponge Capacity Planning for Major Chinese Enterprises, 2012 (Unit: ton)

Enterprise	Capacity Planning	Remarks
State Nuclear WEC Zirconium and Hafnium Co., Ltd.	2,000	-
Guangdong Orient Zirconic Ind Sci & Tech Co., Ltd.	1,150	Existing Capacity 150 tons
Jiangxi Kingan Hi-Tech Co.,Ltd	5,000	-
Aohan China Titanium Industry Co., Ltd.	1,000	-
State Nuclear BaoTi Zirconium Industry Company	1,000	-

Source: ResearchInChina *Global and China Zirconium Industry Report, 2012-2013*

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Based on the analysis of global and China zircon sand supply and demand pattern as well as the development of major Chinese zirconium product segments, Global and China Zirconium Industry Report, 2012-2013? highlights the financial status and development planning of key domestic companies.

Being China's technology leader with core comprehensive competencies, Guangdong Orient Zirconic Ind Sci & Tech Co., Ltd. is also one of manufacturers with the most complete variety of zirconium products worldwide. In 2012, the company on the one hand increased investment in Australian zircon sands to reduce the impact of imported zircon sand price fluctuation on costs; on the other hand, the product investment priority shifted to metal zirconium. By 2013, the company's nuclear-grade zirconium sponge capacity is expected to reach 1,150 tons.

As one of China's largest producers of zirconium chemicals, Jiangxi Kingan Hi-Tech Co.,Ltd has had annual production capacity of 77,800 tons of zirconium chemicals as of 2012. In recent years, in addition to increasing investment in zirconium oxychloride project so as to stabilize competitive edge in zirconium chemicals market, the company has also cooperated with AREVA in the construction of

the 5,000 tons nuclear-grade zirconium sponge project, which has been under construction at the end of 2012.

Aohan China Titanium Industry Co., Ltd. is currently the largest zirconium sponge production enterprise in China, as of end-2012, it has been provided with production capacity of 700 tons of industrial zirconium sponge; over the next 3-5 years, the company will add new capacity of 300 tons nuclear-grade zirconium sponge, meanwhile with the zirconium sponge production technology up to the domestic medium level.

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