



**Global and China Germanium Industry
Report, 2012-2015**

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

Germanium falls under the category of scattered metal and it is widely applied in hi-tech fields. With proved reserves of 8,600 MMT worldwide, germanium is mainly found in countries like America, China and Canada. In particular, germanium reserves in America makes up 45% of the world's total, followed by China in which the proportion hit 41%. Usually, Germanium ore associates with lead zinc ore; and the exploration of lead zinc ore is likely to pose grave threat to the environment. Given the rigid environmental protection regulations, America is a small germanium ore exploiter and producer, while China produces 70% germanium of the global total.

The development of China germanium industry features a great many of primary products and a small portion of intensive processing products. Given this, the Chinese government has bolstered the development of top-grade germanium products in recent years, vowing that deep-processing products of monocrystalline germanium slices and germanium optical components can enjoy 17% and 15% export tax rebates, respectively. In response to the favorable policy, flagship enterprises including Yunnan Lincang Xinyuan Germanium Industry Co.,Ltd., Yunnan Chihong Zinc&Germanium Co., Ltd., and Nanjing Germanium Technology are setting up downstream products manufacturing bases in a successive way.

The report highlights the China and worldwide demand and supply of germanium products, and conducts an in-depth survey on the financial situation and development planning of leading industrial players at home and abroad on the basis of the development of major germanium products breakdown markets of China.

As one of the world's most important germanium products manufacturers, Umicore's electro-optical materials business division is specialized in the production of PV products, LED products substrates, optical materials, and night-vision technology optical components.

Export Rebate Rate of Germanium-Related Products in China, 2013

Products	2013
Germanium Dioxide	0%
Germanium Ingot	5%
Monocrystalline Germanium	5%
Germanium Optical Component	15%
Monocrystalline Germanium Slices for Solar Cell Use	17%

Source: ReserachInChina Global and China Germanium Industry Report, 2012-2015
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Yunnan Lincang Xinyuan Germanium Industry Co.,Ltd. is the only listed company primarily focused on the production of germanium products in China, featuring the most complete germanium industrial chain and the largest amount of germanium metal reserves. In 2013, the company is set to purchase ore exploitation rights to integrate upstream resources. At the same time, downstream germanium products processing projects of the company have been put into production successively, including monocrystalline germanium slices for solar cell use, germanium tetrachloride for optical fiber use and infrared optical germanium lens.

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