



**China Rare Earth Industry Report,  
2012-2015**

**Apr. 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

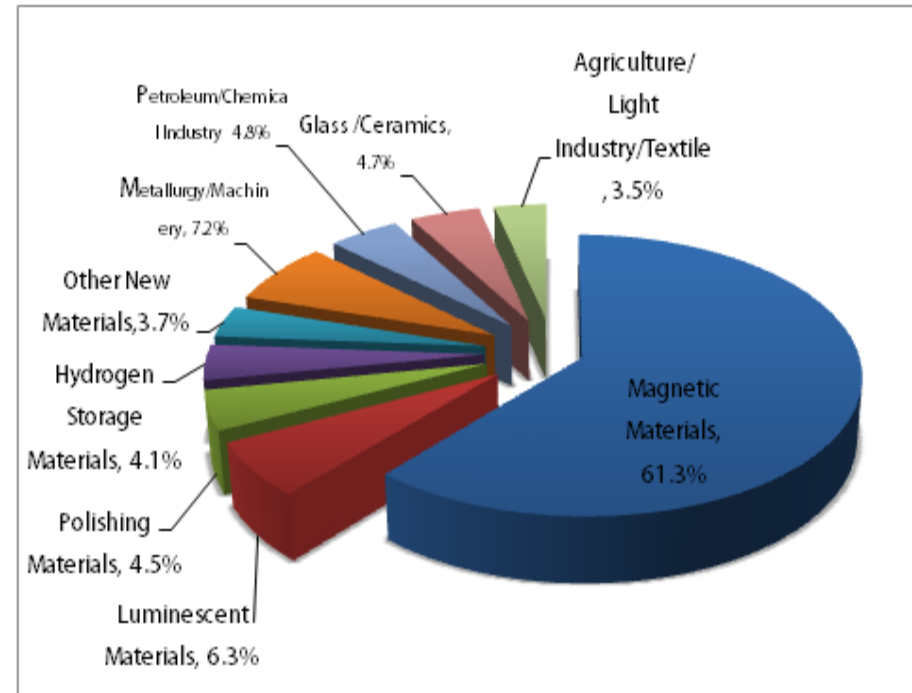
The primary information sources include China Customs, and National Bureau of Statistics of China etc.

## Abstract

As the world's major rare earth country, China occupies 50% of the total global rare earth reserves, but also provides about 90% of the global rare earth products every year. In order to protect rare earth resources, it has promulgated a number of policies over the years to limit over-exploitation and export of rare earth, including mining license control, total quantity control, export quotas, special invoice system, etc., whose implementation has caused supply decrease and price increase as far as Chinese rare earth products are concerned.

In China, rare earth consumption can be divided into traditional field and new material field, of which, the former covers metallurgy / machinery, petroleum / chemicals, glass / ceramics, agriculture / light industry / textile, etc., and the latter mainly refers to permanent magnet materials, luminescent materials, polishing materials and hydrogen storage materials. In recent years, driven by downstream demand, the new material field has witnessed rising consumption of rare earth. It is expected that in 2015, the demand for rare earth from new materials will account for 79.8% of the total, of which, magnetic materials will show the largest of 61.3%.

China Rare Earth Application Structure, 2015E



Source: ResearchInChina *China Rare Earth Industry Report, 2012-2015*

As China's largest manufacturer of magnetic materials especially NdFeB, Beijing Zhong Ke San Huan Hi-Tech Co., Ltd. has an annual capacity of about 14,000 tons of sintered NdFeB (ranking first domestically) and 1,500 tons of bonded NdFeB. Its NdFeB products are primarily applied in automotive, VCM, energy-saving motors, wind power and other industries, of which, demand from the automotive industry occupies approximately 40% of the total revenue. In 2012 thanks to the substantial growth in automotive EPS demand, the company's performance experienced growth against the overall industry malaise.

Jiangmen KanHoo Industry Co., Ltd is China's largest rare earth luminescent materials producer, with an annual capacity of about 1,500 tons of rare earth phosphor powder, 97% of which for energy-saving lamp use. In 2012 due to the price fluctuations in raw materials, the company's product prices were reduced, sales volume fell, and performance showed a substantial decline, of which, revenue and operating income dropped by 51.56% and 79.87% YoY, respectively. In the first half of 2012, the company's overall performance declined, but the revenue from rare earth luminescent materials used in emerging fields achieved 27.1% growth. In the future, the company will continue to expand the market of rare earth luminescent materials for induction lamp, white-light LED, flat panel display, and so on.

## **China Rare Earth Industry Report, 2012-2015 of ResearchInChina mainly covers the followings:**

- Global rare earth resources and reserves, distribution, supply and demand, as well as development forecast for 2013-2015;
- China's rare earth resources and reserves, distribution, supply and demand, consumption, exports, prices, as well as development forecast for 2013-2015;
- Main policies and development trend of rare earth industry in China;
- Development status and plans for rare earth industry in main areas of China;
- Development status, demand for rare earth and growth trend of China's major new materials industries;
- Operation, product capacity, strategic planning, etc. of China's leading rare earth producers and new materials enterprises.

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