



Global and China Lithium Carbonate Industry Report, 2013

Oct. 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

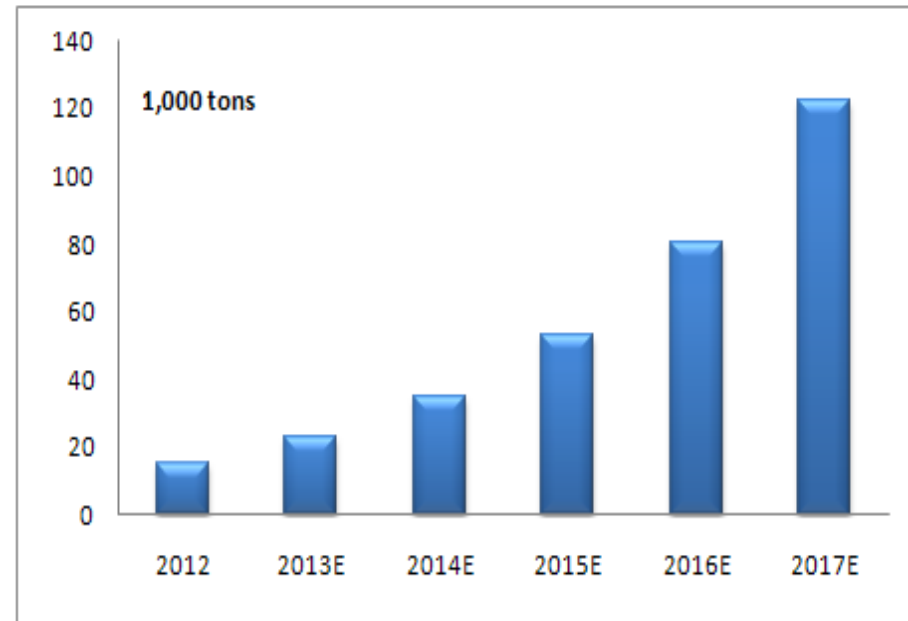
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Affected by flood, the lithium carbonate output of Chile, the world's largest producer of lithium carbonate, declined, leading to tight supply and a new round of price rise in the global lithium carbonate market in 2012. In the first half of 2013, as some enterprises released capacities and the demand from downstream industries is in an off-season, the supply tension was eased, and the price fell to some extent, but overall remained at a high level.

The downstream demand for lithium carbonate is strong, and emerging industries like New Energy Vehicle with a good growth momentum will become the main force driving the growth of the lithium carbonate industry in the future. It's expected that the global New Energy Vehicle's demand for lithium carbonate will maintain a growth rate of more than 50% in 2013-2017, and hit 122,000 tons in 2017. Judged by the current supply and demand developments, the global lithium carbonate supply gap will be large in 2017, and the lithium carbonate price will continue the upward trend.

Global Lithium Carbonate Demand from New Energy Vehicles, 2012-2017E



Source: ResearchInChina Global and China Lithium Carbonate Industry Report, 2013

China is the world's second largest owner of lithium ore resources, and has the world's third largest lithium carbonate capacity which is about 15%. China's lithium carbonate suppliers mainly include spodumene suppliers such as Tianqi Lithium Industries and salt lake suppliers like Qinghai Salt Lake Industry. China's salt lake development is currently in an early stage, and the capacity is quite limited. Comparatively, spodumene suppliers have stronger competitiveness.

Tianqi Lithium Industries is a lithium carbonate supplier with the largest capacity in China. It has the mining right of Yajiang Cuola Spodumene Mine, the capacity is 11,000 tons, and the output and sales volume of lithium products in 2012 both exceeded 11,000 tons. In September, 2013, the company's acquisition of 65% stake in Talison, a major global spodumene mining rights owner, was approved by the Ministry of Commerce of the People's Republic of China, which will expand the mineral resources, improve product margins and enhance product competitiveness of the company.

Qinghai Salt Lake Industry, located at China's largest dry inland salt lake - Chaerhan Salt Lake, has the second largest lithium carbonate capacity in China. At the end of 2012, the company completed technical transformation and enhanced its lithium carbonate production capacity to 10,000 tons, but the output was only 460 tons in 2012 and 213 tons in the first half of 2013, with low capacity utilization. In the future, with the increase in tedding time, gradient brine will be gradually formed, and the lithium ion content will grow up, which will enhance the company's output and expand the company's market share.

Global and China Lithium Carbonate Industry Report, 2013 of ResearchInChina makes a comprehensive analysis of the global and China lithium carbonate industry, mainly involving the followings:

Global lithium ore distribution, lithium carbonate supply and demand, market structure, corporate capacity building, as well as industry forecasts for 2013-2017;

China's lithium ore distribution, lithium carbonate supply and demand, import and export, price analysis, as well as industry forecasts for 2013-2017;

Development trend of lithium carbonate demand from downstream sectors especially New Energy Vehicle;

Development of major global and Chinese lithium carbonate suppliers, including resources, capacity, output and sales volume, operation, latest projects and business forecast.

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