



Global and China Cobalt Industry Report, 2013-2016

Jan. 2014

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

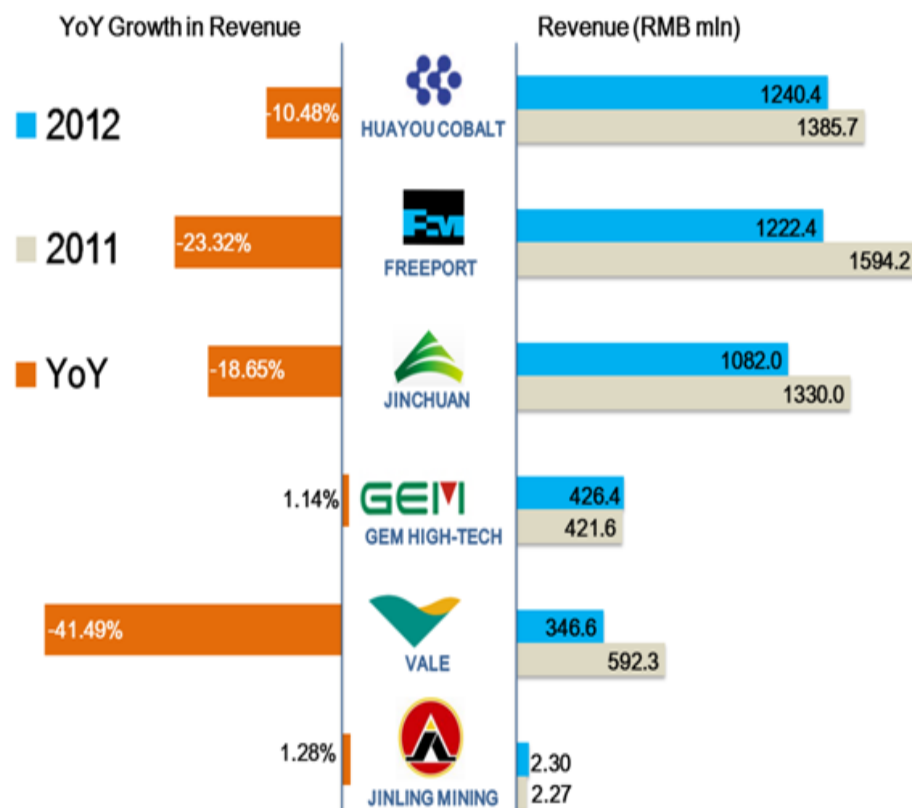
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Affected by the global economic downturn and the slowdown in economic growth of China, in 2012, the growth rate of global output of cobalt fell sharply, with annual output of 110,000 tons, up by merely 0.9% year on year; the output of refined cobalt also declined dramatically, down 6.1 % year on year to 77,200 tons. In 2013, the global cobalt market rallied slightly, but it was still not optimistic as a whole, it is expected that annual output of cobalt in 2013 will show a year-on-year rise of about 3.6%.

China lacks of cobalt ore resources, with the total proven reserves of cobalt approximating 80,000 tons, accounting for just 1% of global total, and the vast majority of proven resources are associated ore, whereas independent mineralized cobalt ore occupies only 4.7 % of the reserves in China. Known cobalt ores in China are mainly distributed in Gansu province which makes up 30.5% of China's cobalt reserves. China is a big consumer of cobalt, which is primarily utilized in downstream sectors to produce battery, hard alloy, magnetic materials and other products. In 2012, cobalt used in batteries takes up 67% of total consumption of cobalt in China, up 4 percentage points from a year earlier.

Revenue of Global and China Major Cobalt Companies, 2011-2012



The "Global and China Cobalt Industry Report, 2013-2016" focuses on the analysis of operating conditions and cobalt business development of 4 global and 12 Chinese companies based on the analysis of global and China's cobalt mineral resources, policies, market supply and demand, price and competitive pattern.

Jinchuan Group International Resources Co. Ltd is the largest producer of cobalt in China, possessing a complete integrated industrial chain of mineral exploration, mining, processing, smelting, refining and chemical engineering. As of the end of 2012, Jinchuan Group had boasted an annual production capacity of 9,100 tons of cobalt, a 50% market share in electrical cobalt market, and a 33% market share in cobalt oxide market. In 2012, Jinchuan Group acquired the South African company Mette Reese, thus adding cobalt mineral resources of 330,000 tons and cobalt metal base reserves of 88,000 tons.

Huayou Cobalt Co., Ltd. is the largest manufacturer of cobalt chemicals in China, with comprehensive cobalt production capacity ranking No.2 at home. It has KOLWEZI mine, NYOKA mine, KAMBOVE tailings and other mineral resources in Africa and other regions, with total amount of 31,900 tons of cobalt metal. By the end of 2012, the company had possessed an annual production capacity of cobalt chemicals with 5,550 tons of cobalt metal content, with sales-output ratio of 105.02%. According to the company's production plan, in 2013 the company's cobalt sales are expected to reach approximately 8,200 tons. Meanwhile, the company's ongoing project in Quzhou city will begin production in the second half of 2013 which will add a production capacity of 10,000 tons of cobalt chemicals.

Shenzhen Green Eco-manufacture Hi-tech Co.,Ltd. is a leading Chinese manufacturer of cobalt powder. As of the end of 2012, the company's production capacity of cobalt powder was 2,000 tons. At the end of 2012, the company completed the acquisition on 51% stake of Jiangsu Cobalt Nickel Metal Co., Ltd. After the acquisition, the company's production capacity of cobalt oxide, electrodeposition cobalt and ternary materials reached 4,000 tons, 1,800 tons and 1,000 tons respectively. If the company's new high-performance nickel-cobalt-manganese ternary material project and other projects were included, the overall cobalt production capacity of the company will reach 16,000 tons in 2015.

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