

# China Rare Earth Industry Report, 2014-2018

Jun. 2015

## 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

Rare earth, also known as rare earth metal or rare earth element, collectively refers to lanthanides (including fifteen elements) and closely-related scandium and yttrium. As a crucial strategic resource, it is mainly contained in bastnaesite, xenotime, monazite, and other minerals. At present, rare earth resources have been discovered in about 35 countries and regions around the world, with total reserves of 130 million tons, of which 42.3% are owned by China alone.

In order to protect and rationally develop superior resources, China has adopted a cap-control policy for rare earth exploitation since 2006 so that the rare earth ore production suffered a continuous decline from 2010 to 2013. In 2014, the State raised the upper limit, a move that helped drive the rare earth output rise 14.5% year on year to 95,000 tons, occupying about 86.4% of the global total.

Besides meeting the domestic demand, China's rare earth and its products are also exported to the United States, Europe, Japan, South Korea, etc., with 2014's export volume of rare earth products reaching about 29,000 tons (rare-earth permanent magnet products 75.5%), accounting for 32.1% of the total output. Despite a steady rise in rare earth product exports over the past two years, the export value, affected by the lower export prices, continued to fall, by 35.7% to USD370 million in 2014.

China's rare earth industry has been facing quite a few challenges like low enterprise concentration and scattered layout. In 2014, Inner Mongolia Baotou Steel Rare-earth, which represents the largest market share, generated revenue that accounted for a meager 7.1% of the total nationwide. In 2015, the 6 major rare earth companies will implement integration, when the rare earth industry concentration will increase significantly.

**Inner Mongolia Baotou Steel Rare-earth (Group):** As China's largest rare earth producer, the company has an annual capacity of approximately 350,000 tons/a. In April 2015, the company, along with the Department of Science and Technology of Inner Mongolia, Baotou Municipal Government, and Chinese Academy of Sciences (CAS), established CAS Baotou Rare Earth Research and Development Center, hoping to further enhance the research and development capabilities of rare earth application products.

**Rising Nonferrous Metals Group:** On May 30, 2015, the company proposed to raise a fund of RMB2.2 billion from targeted sources, of which RMB570 million will go into rare earth mine expansion: RMB390 million into Pingyuan Huaqi Rare Earth Industrial Co., Ltd., and RMB180 million into Dapu Xinchengji Industry & Trade Co., Ltd.











**China Non-ferrous Metal Industry's Foreign Engineering and Construction:** In March 2014, the company began to develop Kvanefjeld rare earth project in cooperation with Greenland Minerals and Energy. In March 2015, the project's feasibility research was completed and pilot operation can be carried out within the year.

**Zhong Ke San Huan:** As the largest NdFeB manufacturer in China, it now has the capacity of 14,000 tons/a sintered NdFeB and 1,500 tons/a bonded NdFeB. In February 2015, the company signed an agreement with Hitachi Metals over an attempt to set up a high-performance NdFeB joint venture in China, with a design capacity of 2,000 tons/a.

China Rare Earth Industry Report, 2014-2018 compiled by ResearchInChina mainly deals with the following:

- ✘ Status quo, supply and demand, key enterprises, etc. of global rare earth resources;
- ✘ Industry environment, policy environment, regional development, etc. of rare earth in China;
- ✘ Market size, market structure, export, market price, etc. of rare earth in China;
- ✘ Market demand, major producers, etc. of main rare earth new materials in China;
- ✘ Operation, revenue structure, rare earth business, etc. of 13 major rare earth producers in China;
- ✘ Operation, revenue structure, latest developments, etc. of 5 rare earth new material manufacturers in China.

## Rare Earth Production Bases and Capacity of China Main Manufacturers, 2015

Manufactures	Main Production Bases	Capacity ( kt )
 Northern Rare Earth	Baotou Zibo Ganzhou Beijing	340
 RNM	Ganzhou Heyuan Shaoguan Meizhou	24
 XTC	Longyan	21
 GNEB	Ganzhou Ningpo Tianjin Zhaoqing Yangquan	18
 Grirer	Taixing Leshan Langfang Nanning	15
 Shenghe Resources	Leshan Xi'an	13
 NFC	Zhujiang Shaoguan	10
 Jiangxi Tungsten	Ganzhou	9
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Source: China Rare Earth Industry Report, 2014-2018; ResearchInChina

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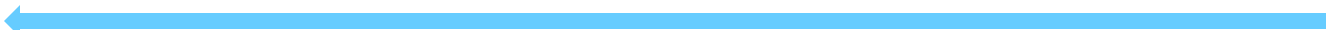
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