



**Global and China Nickel Industry Report,
2017-2020**

June 2017

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

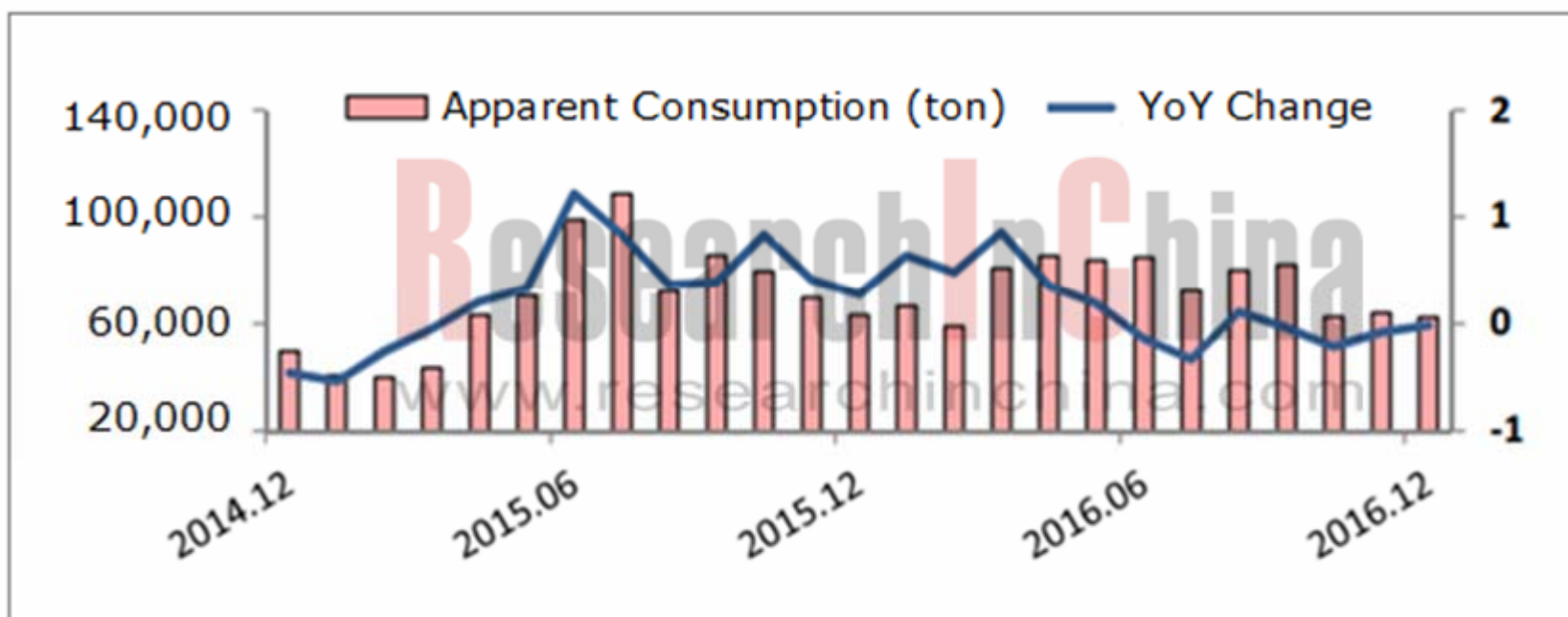
Global primary nickel output in 2016 fell 1.5% to 1.934 million tons. In 2017, as China's nickel pig iron project in Indonesia reaches design capacity gradually, nickel metal supply is expected to hit 250 kilotons with an additional 150 kilotons, primarily owing to the rapid rise of Jiangsu Delong Nickel Industry's project in Indonesia. Affected by this, global primary nickel output is expected to reverse the downward trend since 2014, with an expected output of 2.06 million tons, up 6.7%.

In 2016, global demand for refined nickel was 1.8791 million tons, down 2.64% year on year, indicating a supply shortage of 51.5 kilotons, the situation was still not optimistic. By country, main consumption areas such as China, Japan, the United States, Taiwan and South Korea reported consumption growth, especially consumption in S. Korea surged 36.7% year on year.

China with nickel ore reserves of 2.5 million tons occupies the tenth position in the world, but it has been importing nickel ores and refined nickel for a long time, especially the degree of import dependence on Philippine nickel ores remains above 70%. The Philippine government is now concentrating on cleaning up and reorganizing large nickel mines, which affects China's imports of Philippine nickel ores.

In 2016, China's nickel ore production added up to 90 kilotons, down 10.71% year on year. Influenced by raw material constrictions and prices, Jinchuan Group plans output of 140-145 kilotons for 2017, a year-on-year decrease of 12 kilotons, while other enterprise in production show stable yield. At the current level of nickel prices, enterprises in discontinued production including Shaanxi Huaze Nickel & Cobalt Metal and Yunnan Tin Group Yuanjiang Nickel Industry have weak incentives to restore production. Nickel fundamentals were improved in 2016, resulting in a steady rebound in nickel prices under the expectation of a supply contraction. As the nickel supply-demand gap continues in 2017, nickel prices are expected to recover gradually, accompanied by RMB76,000-105,000/ton fluctuations and an average of approximately RMB90,000/ton in China this year.

Refined Nickel Consumption in China, 2014-2016 (ton)



Source: Global and China Nickel Industry Report, 2017-2020 by ResearchInChina

Influenced by factors such as raw materials and environmental protection, China's NPI capacity concentration has increased: there are more than 40 nickel-iron (RKEF, electric furnace, blast furnace) enterprises in production in China, a dive compared with more than 200 during the peak period since a lot of small nickel-iron enterprises have exited due to raw material supply, cost, environmental protection, etc. while some large, competitive enterprises became profitable and intensified expansion efforts in 2016.

In 2016, China's primary nickel consumption reached 1.04 million tons, increasing by 6.1% year on year and accounting for 52% of global consumption; the moderated growth was attributed to a slowdown in Chinese stainless steel demand. However, the growing permeability of ternary lithium battery in the field of new energy vehicles stimulates nickel demand from batteries. Concerning China's primary nickel consumption in 2016, battery accounted for 4%, which would be raised further in the future.

The report highlights the following:

- ◆ Global nickel reserves, supply and demand balance, consumption structure, price trend, competitive landscape, etc.;
- ◆ China's nickel reserves, supply and demand balance, consumption structure, price trend, industrial profit, as well as enterprise start-up, shut-down, restart, etc.;
- ◆ China's nickel product import & export and demand from downstream sectors (stainless steel, battery, etc.);
- ◆ Operation, nickel ore resource distribution, output, sales volume, price, etc. of 9 nickel enterprises worldwide;
- ◆ Operation, development plan, nickel ore resource distribution, output, sales volume, price, etc. of 6 nickel enterprises in China.

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