



Global and China Vanadium Industry Report, 2018-2023

November 2018

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

Vanadium, deemed as the “vitamin” of metals, finds wide application in steel, chemicals, new materials and new energy. There is now global research and development of vanadium for applying it to more industries.

Before climbing to the estimated 151,000 tons in 2018, global vanadium output began to pick up in 2017, by 2.1% from a year earlier to 148,000 tons (V₂O₅), largely because output in Brazil and China rose. Global vanadium output will keep an average annual growth rate of 3.5% or so between 2018 and 2023.

China as the world’s largest vanadium producer reported output of 84,000 tons (V₂O₅) in 2017, 3.3% more than in the previous year, and a 57% share of the global total, which showed Chinese players’ more enthusiasm for production. With rising price and demand, China’s vanadium output will keep growing in the forthcoming years but at a moderate pace due to the government’s environmental campaigns and its ban on the import of vanadium slags. It is predicted that vanadium output in China will present an AAGR of 3.5%-4.5% from 2018 to 2023, a bit above the global average.

As concerns market demand in China, over 85% of vanadium products are consumed by steel sector. The new national standard, GB/T 1499.2-2018 Steel for the Reinforcement of Concrete -- Part 2: Hot Rolled Ribbed Bars effective from November 2018, requires that some alloy elements like vanadium and bismuth should be added to new ribbed bars, but mere 30% of products in China are subject to the new standard. Accordingly, China will see soaring demand for vanadium after 2018, with an AAGR of around 10.0%.

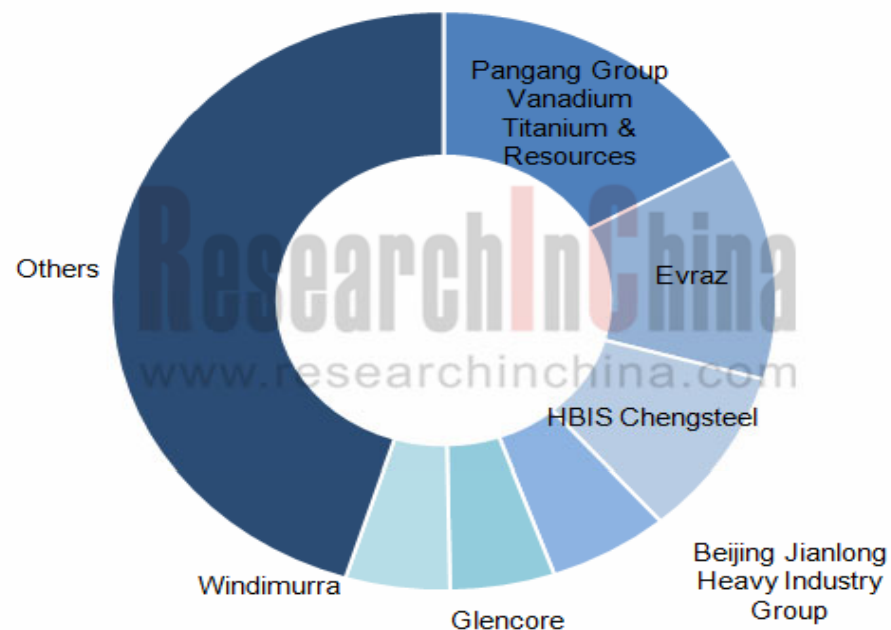
As for market price, the Chinese Government’s environmental supervision and the policy of prohibiting the import of vanadium slags led to price hikes of vanadium in the second half of 2017; in 2018, vanadium (V₂O₅) price shot up again from RMB20,000/ton in January to RMB46,000/ton in October, a spurt of roughly 130%, which was caused by the issuance of the new ribbed bar standard at the start of the year and a slump in vanadium inventory. So still a certain gap will remain between supply and demand in the next a few years, showing little sign of price decline.

The world-renowned vanadium producers consist of Pangang Group Vanadium Titanium & Resources Co., Ltd., HBIS Chengsteel, Russia’s Evraz and Switzerland-based Glencore. In 2017, Pangang Group Vanadium Titanium & Resources Co., Ltd. as the largest producer among them, seized a market share of 16.8%; Evraz followed, with 12.6%.

Global and China Vanadium Industry Report, 2018-2023 highlights the following:

- ◆ Vanadium (definition, industry chain, etc.);
- ◆ Global vanadium market (resource reserves, supply & demand, prices, competitive pattern, etc.);
- ◆ Chinese vanadium market (resource reserves, supply & demand, prices, import & export, competitive pattern, application, etc.);
- ◆ 5 foreign and 11 Chinese vanadium producers (operation, vanadium business, etc.).

Competitive Landscape of Global Vanadium Market, 2017



Source: ResearchInChina

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