

China Mining Industry

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Abstracts

China is a major player in most commodities in the world. In terms of scale and magnitude, China's mining industry ranks third in the world, although production statistics are sketchy. Most of China's mineral production is consumed locally by state owned enterprises or banks. Over the years, China has established a mining industry system with a complete range of departments including geology, production, construction, scientific research, design, equipment manufacture, management, education and training. The country has about 80,000 state-owned mining enterprises and 200,000 collectively owned mines. Driven by unprecedented industrial growth, the Chinese mining market is set to experience major growth. The road has not been all that smooth, however, as industry regulation and barriers to investment by overseas firms have challenged the industry's expansion.

Recent stimulus packages are paying dividends, but competition from India and Brazil are set to keep a burgeoning industry on its toes. The Chinese mining industry is set to experience strong growth, driven by demand from the power, manufacturing and construction industries and the Chinese Government's \$600 billion stimulus package. Coal will continue to dominate mineral production, followed by the metallic minerals category and the non-metallic minerals category, which will also see some growth. Despite a wealth of unexplored mineral reserves, China imports a large percentage of its mineral resources and is encouraging foreign direct investment (FDI) in the mining industry, in order to explore these reserves and produce new mining technologies.

Top players in the industry are Zijin Mining, Zhaojin Mining, Shandong Gold, Jiangxi Copper, Datong Coal and Jinchuan Nonferrous Metals, amongst others. Several of China's current mining operations are approaching ore reserve depletion, which has resulted in the need to locate and develop new projects. This, coupled with a desire to encourage foreign investment in several sectors of the mining industry, makes China a highly prospective country. There is an increasing emphasis on the negative

environmental impact of mining activities, with the imposition of an environmental tax on certain industries and the introduction of a 'green standard' for the rare earths sector to curb emissions. Cases of smelters, lead plants, or mines that are not up to environmental standards being closed are common place.

Recently, the government suspended new prospecting and mining licenses for the coal and rare earths sectors to prevent over-mining. Additionally, the Institute of Geological Environmental Monitoring plans to build 10 state-level geological environment monitoring demonstration zones in the north-east, north-west, north and Yangtze River regions by the end of the 12th Five Year Plan.

China has a massive trade surplus and its huge foreign exchange reserves serve as a major cushion against external shocks. China's expanding economy is gradually giving it greater clout in international affairs, which will allow it to build politically important ties, especially with the developing world. As China moves up the value chain, it will develop its own global brand name companies, fostering innovation and growth.

In this industry scenario, Taiyou Research analyzes the China Mining Industry. The report covers the following:

An industry definition.

A brief analysis of the Asia Pacific mining industry. We look at the mining industries in Australia, China, Indonesia, India, and Philippines.

An analysis of the Chinese mining industry includes market profile, industry statistics, market value and volume analysis, an industry segmentation and a regional market share analysis.

Analysis of the regulatory framework governing the mining industry in China. We also look at the tax reforms undertaken by the Chinese government recently, along with the laws for intellectual property protection, property laws, FDI policies, amongst others.

An analysis of the various commodity markets in China. Markets analyzed include the market for bauxite, coal, copper, gold, iron ore, nickel, and tin. For each commodity, we analyze production statistics, new projects, existing projects, major producers, and the industry profile.

Competition in the industry is analyzed through competitive landscape, industry fragmentation, safety issues plaguing the Chinese mining industry and an analysis of the major companies.

Major players are analyzed through a company overview, analysis of the major business segments, and a SWOT analysis.

An industry forecast that looks at the market outlook, industry consolidation in the future, forecast for gold and bauxite mining in China, regulatory challenges, the future of mining equities, the impact of global coal dynamics, and China's investment in Africa, amongst other factors.

Taiyou Research's presentation on the China Mining Industry is a comprehensive coverage of this growing industry.

Contents

1. EXECUTIVE SUMMARY

2. INDUSTRY DEFINITION

3. ASIA PACIFIC MINING INDUSTRY

3.1 Australia

3.2 China

3.3 Indonesia

3.4 India

3.5 Philippines

4. CHINA MINING INDUSTRY

4.1 Market Profile

4.2 Industry Statistics

4.3 Market Value & Volume Analysis

4.4 Industry Segmentation

4.5 Regional Market Share

5. REGULATORY FRAMEWORK

5.1 Industry Regulations

5.2 Tax Reforms

5.3 IP Laws

5.4 Law System

5.5 Property Laws

5.6 FDI Policy

5.7 Trade Laws

5.8 Issues with Corruption

6. CHINA'S BAUXITE MARKET

7. CHINA'S COAL MARKET

8. CHINA'S COPPER MARKET

9. CHINA'S GOLD MARKET

10. CHINA'S IRON ORE MARKET

11. CHINA'S NICKEL MARKET

12. CHINA'S TIN MARKET

13. COMPETITION IN THE INDUSTRY

13.1 Competitive Landscape

13.2 Industry Fragmentation

13.3 Safety Issues

13.4 Major Companies

14. MAJOR INDUSTRY PLAYERS

14.1 Aluminum Corporation of China

14.1.1 Company Overview

14.1.2 Business Segments

14.1.3 SWOT Analysis

14.2 Baosteel Group Corporation

14.2.1 Company Overview

14.2.2 Business Segments

14.2.3 SWOT Analysis

14.3 China Shenhua Energy Company

14.3.1 Company Overview

14.3.2 Business Segments

14.3.3 SWOT Analysis

14.4 Jiangxi Copper Company

14.4.1 Company Overview

14.4.2 Business Segments

14.4.3 SWOT Analysis

14.5 Shandong Gold Mining Co., Ltd

14.5.1 Company Overview

14.5.2 Business Segments

14.5.3 SWOT Analysis

14.6 Metallurgical Corporation of China Limited

14.7 Minmetals Development Co., Ltd.

- 14.8 Zijin Mining Group
- 14.9 Zhaojin Mining Industry

15. INDUSTRY FORECAST

- 15.1 Market Outlook
- 15.2 Industry Consolidation
- 15.3 Gold Mining
- 15.4 Bauxite Mining to Lead Base Metals Segment
- 15.5 Regulatory Challenges
- 15.6 Mining Equities
- 15.7 Global Coal Dynamics
- 15.8 New Mineral Discoveries
- 15.9 Chinese Investment in Africa
- 15.10 Investment Risks

16. GLOSSARY

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