

China Rare Earth Industry Report, 2009

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Abstracts

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China is the world's largest rare earth country, as well as the largest rare earth producer, consumer and exporter. According to USGS, China's rare earth industrial reserves and basic reserves reached 27 million tons of ROE and 89 million tons of REO respectively in 2008, accounting for 30.7% and 59.3% in the world. In addition, China's rare earth ore output covered 96.8% in the global total in 2008.

The global economy has not turned much better in 2009, and the progression of world's economy will be confronted with the increasing uncertainties. It is a difficult year for rare earth industry. China focuses on stabilizing and expanding domestic market, as well as improving export environment, continues to control the total exploiting amount of rare earth, accelerates to eliminate backward output capacity, promotes company reorganization, and drives industry structure adjustment and upgrading.

The rare earth market price remained low in 2008H2, represented by Pr-Nd oxide, the price of which dropped to RMB50,000/ton, down 64.3% year-on-year. In 2009, the rare earth price recovered a bit, but still at low level. Considering the rare earth demand in the countries such as Japan is still pessimistic, it is still difficult that the price recovers dramatically currently. The future price trend will be influenced by industry integration and rare earth application expansion.

Rare earth product consumption in the traditional field has a lower growth margin than that in high-tech field, and the ratio in 2008 had fallen to 43% from 48% in 2005. The permanent magnetic material is the most important part in rare earth new materials consumption field. Presently, the permanent magnetic materials such as NdFeB have

been widely applied in electronic information, automotive industry, medical device and energy and communication. In the meantime, they have shown the powerful development potentials in many emerging sectors like wind power, electric vehicles and industrial energy-efficient motors.

Under the background of global economy downturn, China's rare-earth companies all had been impacted by degree from 2008 to the midst of 2009. For instance, China's rare earth leader, the revenue of Baotou Steel Rare-Earth (Group) Hi-Tech Co., Ltd dropped 30.01% in the middle of 2009, net profit fell 127.19%, with the loss of RMB67 million.

Baotou Steel rare-earth products mainly include rare earth concentrate, rare earth deep-processing, new rare-earth materials production and rare earth hi-tech application and development. In 1H 2009, its rare earth oxide accounted for 57.1% in the total revenue, followed by rare earth metals and mixed rare-earth carbonates, covering 29.4% and 13.5% respectively.

According to authoritative statistics from National Bureau of Statistics of China, Chinese Society of Rare Earth and China Customs, the report makes an in-depth analysis of rare earth industry development, market change trend, main rare earth production areas, latest trends of rare earth application, as well as key manufacturers, and discusses the future development of China's rare earth industry.

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