

# China Tungsten Industry Report, 2012-2015



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Date:	May 4, 2013
Pages:	83
Price:	US\$ 1,950.00
ID:	C148A63B2EBEN

China, as the world's largest Tungsten resource county, holds 58.95% of global tungsten reserves and supplies around 85% of tungsten ore worldwide. In 2012, China newly added 200,000 tons of tungsten(WO365%) reserves and output of 131,100 tons of tungsten concentrates (WO365%), down 3.35% from a year earlier. Exposed to the restrictive policies on control of exploitation amount and export quotas as well as new limited prospecting of resources, etc, the supply and demand in tungsten market is obviously out of balance, and it is expected that China's output of tungsten ore will see limited growth in the upcoming several years, and that global tungsten market will be still in tight supply.

The slowdown in downstream demand from machining, electronics, real estate markets in 2012 caused the sluggish development of China tungsten industry, with the consumption of tungsten concentrate (WO365%) decreasing by 15.6% year-on-year and the lingering price slump.

Starting from Mar.2013, the demand for tungsten products at home and abroad saw a huge surge, with the selling price on a gradual rise.

In China, major tungsten producing regions concentrate in Jiangxi, Hunan, Henan, Guangxi and Fujian, the combined tungsten concentrate (WO365%) of which occupied over 88% of China's total in 2012. In particular, Jiangxi came out top in terms of tungsten concentrate (WO365%) output registering 46,500 tons.

In Jiangxi, leading tungsten processing enterprises include Chongyi Zhangyuan Tungsten Co., Ltd, Jiangxi Tungsten Industry Group Co., Ltd, Jiangxi Rare Earth Metals Tungsten Group Co., Ltd., and Jiangxi Xiushui Xianglushan Tungsten Co., Ltd, while in Hunan, the counterparts are represented by Hunan Nonferrous Metals Holding Group Co., Ltd and Chenzhou Mining Group Co., Ltd, and in Fujian, there are Xiamen Tungsten Co., Ltd, etc. All of these industrial players are provided with relatively complete industrial chain. However, most of them suffered from fall in business performance due to the weakened demand in 2012, and sought for expansion towards downstream industrial chain.

Xiamen Tungsten Co., Ltd is equipped with complete tungsten industrial chain. In Feb.2013, the company took over 60% stake of Jiangxi Duchang Jinding Tungsten & Molybdenum Mining Co., Ltd in a bid to improve the output of tungsten concentrate upstream; in Aug., 2011, it teamed up with China Minmetals Non-ferrous Metals Co., Ltd to invest 3,000 tons/a and 2,000 tons/a hard alloy projects which are expected to be put into production in Aug.2014; in Apr., 2013, Xiamen Tungsten signed a contract in Luoyang and planned to invest in high-performance hard alloy projects.

Chongyi Zhangyuan Tungsten tapped into high-performance and high-precision coated blade technology upgrading project in Aug.2011. The first phase of the project was partially put into production at the year end of 2012. After it is completely finished, the project is estimated to increase 100 tons of hard alloy knife capacity.

Jiangxi Rare Earth Metals Tungsten Group plans to invest RMB1.54 billion to expand and build nine tungsten projects. It is projected that the company's overall tungsten smelting and processing capacity will record 57,200 tons, of which, the intensive processing and high-end products capacity will hit 4,300 tons as of the year end of 2015.

**The report highlights the followings:**

- Mineral Reserves, Supply & Demand and Development Trend of Global Tungsten Industry;
- Policy Environment, Resource Reserves, Ore Type, Regional Distribution, Supply & Demand, Competition Pattern and Development Trend of China Tungsten Industry;
- Import & Export of Product Breakdown in China Tungsten Industry;
- Operation, Tungsten Business and Development Outlook of nine Chinese Industrial Players.

**Table of Content****1. OVERVIEW OF TUNGSTEN INDUSTRY**

- 1.1 Products
- 1.2 Industry Chain

**2. CURRENT DEVELOPMENT OF GLOBAL TUNGSTEN MARKET**

- 2.1 Reserves of Tungsten Ore Resources
- 2.2 Supply
- 2.3 Demand
- 2.4 Development Trend

**3. CURRENT DEVELOPMENT OF CHINA TUNGSTEN MARKET**

- 3.1 Policy Environment
  - 3.1.1 Policy on Exploitation Control
  - 3.1.2 Export Quota Policy
- 3.2 Tungsten Ore Resources
  - 3.2.1 Resource Reserves
  - 3.2.2 Ore Type
  - 3.2.3 Regional Distribution
- 3.3 Supply & Demand
  - 3.3.1 Supply
  - 3.3.2 Demand
  - 3.3.3 Price
- 3.4 Competition Pattern
- 3.5 Development Trend

**4. IMPORT & EXPORT OF TUNGSTEN PRODUCTS BREAKDOWN IN CHINA**

- 4.1 Tungsten Products
  - 4.1.1 Export
  - 4.1.2 Import
- 4.2 Tungsten Ore Sand & Concentrate
  - 4.2.1 Import & Export
  - 4.2.2 Regional Structure
- 4.3 Tungsten Trioxide
  - 4.3.1 Import & Export
  - 4.3.2 Regional Structure
- 4.4 Sodium Tungstate
  - 4.4.1 Import & Export
  - 4.4.2 Regional Structure
- 4.5 Ammonium Paratungstate
  - 4.5.1 Import & Export

- 4.5.2 Regional Structure
- 4.6 Ammonium Metatungstate
  - 4.6.1 Import & Export
  - 4.6.2 Regional Structure
- 4.7 Tungsten Powder
  - 4.7.1 Import & Export
  - 4.7.2 Regional Structure
- 4.8 Tungsten Wire
  - 4.8.1 Import & Export
  - 4.8.2 Regional Structure

## **5. MAJOR TUNGSTEN MANUFACTURERS IN CHINA**

- 5.1 Xiamen Tungsten Co., Ltd (600549)
  - 5.1.1 Profile
  - 5.1.2 Operation
  - 5.1.3 Revenue Structure
  - 5.1.4 Gross Margin
  - 5.1.5 Clients & Suppliers
  - 5.1.6 R&D and Investment
  - 5.1.7 Tungsten Business
  - 5.1.8 Development Outlook
- 5.2 Chongyi Zhangyuan Tungsten Co., Ltd (002378)
  - 5.2.1 Profile
  - 5.2.2 Operation
  - 5.2.3 Revenue Structure
  - 5.2.4 Gross Margin
  - 5.2.5 Clients & Suppliers
  - 5.2.6 R&D and Investment
  - 5.2.7 Tungsten Products Business
  - 5.2.8 Development Outlook
- 5.3 Chenzhou Mining Group Co., Ltd (002155)
  - 5.3.1 Profile
  - 5.3.2 Operation
  - 5.3.3 Revenue Structure
  - 5.3.4 R&D
  - 5.3.5 Tungsten Products Business
  - 5.3.6 Development Outlook
- 5.4 China Molybdenum Co. Ltd (603993)
  - 5.4.1 Profile
  - 5.4.2 Operation
  - 5.4.3 Revenue Structure
  - 5.4.4 Gross Margin
  - 5.4.5 R&D and Investment
  - 5.4.6 Tungsten Products Business
  - 5.4.7 Development Outlook
- 5.5 Rising Nonferrous Metals Share Co., Ltd (600259)
  - 5.5.1 Profile
  - 5.5.2 Operation
  - 5.5.3 Revenue Structure
  - 5.5.4 Gross Margin
  - 5.5.5 Tungsten Products Business
  - 5.5.6 Development Outlook
- 5.6 Hunan Nonferrous Metals Holding Group Co., Ltd (2626.HK)
  - 5.6.1 Profile

- 5.6.2 Operation
- 5.6.3 Revenue Structure
- 5.6.4 Tungsten Products Business
- 5.6.5 Development Outlook
- 5.7 Jiangxi Tungsten Industry Group Co., Ltd
  - 5.7.1 Profile
  - 5.7.2 Operation
  - 5.7.3 Tungsten Products Business
  - 5.7.4 Development Outlook
- 5.8 Jiangxi Rare Earth Metals Tungsten Group Co., Ltd.
  - 5.8.1 Profile
  - 5.8.2 Operation
  - 5.8.3 Development Outlook
- 5.9 Jiangxi Xiushui Xianglushan Tungsten Co., Ltd
  - 5.9.1 Profile
  - 5.9.2 Operation

## **SELECTED CHARTS**

- Tungsten Industry Chain
- Key Application of Tungsten Products
- Tungsten Industry Chain and Conversion Ratio
- Proven Reserves and Basic Reserves of Tungsten Ore Resources by Country and Proportions, 2012
- Annual Output of Tungsten Ore Worldwide, 2002-2012
- Global Tungsten Ore Output Structure by Country, 2011-2012
- Share of China's Tungsten Output (Metal Output) in Global Total, 2002-2012
- Structure of Major Countries' Demand for Tungsten, 2012
- Global Tungsten Consumption Structure by Country/Product
- Global Output of Tungsten Ore and YoY Growth Rate, 2010-2015E
- Main Measures for Management on Tungsten Ore in China
- Quotas for Exploitation of Tungsten Concentrates Nationwide, 2006-2013
- Indices (1st Batch) on Control of Tungsten Ore Exploitation in China, 2013
- Export Tariff Rates (%) for Major Tungsten Products in China, 2007-2013
- Quotas for Tungsten Product Export in China, 2002-2013
- Namelist and Quotas of Tungsten Exporters in China, 2013
- Tungsten Ore Reserves in China, 2002-2012
- List of above-200,000-ton Tungsten Mines in China
- Structure of Proven Tungsten Ore Reserves by Type in China, 2012
- Structure of Proven Tungsten Ore Reserves by Region in China, 2012
- Tungsten Output and Proportion by Region in China, 2009-2012
- Distribution of Tungsten Ore Resources in China
- China's Output of Tungsten Concentrates (WO365%), 2006-2012
- Monthly Output of Tungsten Concentrates (WO365%) in China, 2012
- Consumption of Tungsten Concentrates and YoY Growth Rate in China, 2002-2013
- Consumption Structure of Tungsten Products in China, 2012
- Price Trend of Tungsten Concentrates in China, 2002-2012
- Price of Tungsten Concentrates (WO365%) in China, 2010-2012
- Ceiling Price and Bottom Price of Tungsten Concentrate in China by Month, 2012
- Price of Ammonium Paratungstate in China, 2010-2013
- Revenue of Leading Tungsten Manufacturers in China, 2009-2012
- Key Product Capacities and Advantages of Leading Tungsten Manufacturers in China, 2012
- Output of Tungsten Concentrates and YoY Growth Rate in China, 2010-2015E
- Tungsten (by Product) Quota Export Volume and Actual Export Volume in China, 2012
- Export Volume and Value of Tungsten Products in China, 2008-2012
- Import Volume, Import Value and Average Price of Tungsten Products in China, 2008-2012
- Import & Export Volume and Value of Tungsten Ore Sand and Concentrate in China, 2002-2012
- China's Import Volume Structure of Tungsten Ore Sand and Concentrate by Country, 2012

China's Export Volume and Value of Tungsten Ore Sand and Concentrate by Country, 2012  
Import & Export Volume and Value of Tungsten Trioxide in China, 2003-2012  
China's Export Volume Structure of Tungsten Trioxide by Country/Region, 2012  
Import & Export Volume and Value of Sodium Tungstate in China, 2003-2012  
China's Export Volume and Value Structure of Sodium Tungstate by Country/Region, 2012  
Import & Export Volume and Value of Ammonium Paratungstate in China, 2003-2012  
China's Export Volume and Value of Ammonium Paratungstate by Country/Region, 2012  
Import & Export Volume and Value of Ammonium Metatungstate Hydrate in China, 2003-2012  
China's Export Volume and Value of Ammonium Metatungstate Hydrate by Country/Region, 2012  
Import & Export Volume and Value of Tungsten Powder in China, 2003-2012  
China's Export Volume Structure of Tungsten Powder by Country/Region, 2012  
Import & Export Volume and Value of Tungsten Wire in China, 2003-2012  
China's Export Volume Structure of Tungsten Wire by Country/Region, 2012  
Key Tungsten Product Manufacturing Subsidiaries of Xiamen Tungsten, 2012  
Revenue and Net Income of Xiamen Tungsten, 2006-2012  
Revenue of Xiamen Tungsten by Product, 2006-2012  
Revenue and Growth Rate of Xiamen Tungsten by Region, 2008-2012  
Export Quotas of Tungsten Products of Xiamen Tungsten, 2008-2013  
Gross Margin of Xiamen Tungsten by Product, 2010-2012  
Chongyi Xiamen Tungsten's Revenue from Top 5 Clients and % of Total Revenue and Its Procurement from Top 5 Suppliers and % of Total Procurement, 2010-2012  
R&D Costs and % of Total Revenue of Xiamen Tungsten, 2011-2012  
Main Projects under Construction of Xiamen Tungsten, 2012  
Tungsten Ore Reserves and Processing Capability of Xiamen Tungsten, 2013  
Tungsten Business Capacity (by Product/Enterprise) of Xiamen Tungsten, 2013  
Production and Sales Volume of Tungsten Products and Output-Sales Ratio of Xiamen Tungsten, 2009-2012  
Revenue and Net Income of Xiamen Tungsten, 2010-2015E  
Key Tungsten Product Manufacturing Subsidiaries of Chongyi Zhangyuan Tungsten, 2012  
Revenue and Net Income of Chongyi Zhangyuan Tungsten, 2006-2012  
Revenue of Chongyi Zhangyuan Tungsten by Product, 2007-2012  
Revenue of Chongyi Zhangyuan Tungsten by Region, 2007-2012  
Tungsten Product Export Quotas of Chongyi Zhangyuan Tungsten, 2008-2013  
Gross Margin of Chongyi Zhangyuan Tungsten by Product, 2007-2012  
Chongyi Zhangyuan Tungsten's Revenue from Top 5 Clients and % of Total Revenue and Its Procurement from Top 5 Suppliers and % of Total Procurement, 2010-2012  
R&D Costs and % of Total Revenue of Chongyi Zhangyuan Tungsten, 2010-2012  
Phase-I Capacity Planning of High-performance and High-precision Coated Blade of Chongyi Zhangyuan Tungsten  
Distribution of Tungsten Ore Reserves of Chongyi Zhangyuan Tungsten, 2012  
Production and Sales Volume and Inventories of Ammonium Tungstate Hydrate of Chongyi Zhangyuan Tungsten, 2011-2012  
Revenue and Net Income of Chongyi Zhangyuan Tungsten, 2010-2015E  
Key Tungsten Product Manufacturing Subsidiaries of Chenzhou Mining Group  
Revenue and Net Income of Chenzhou Mining Group, 2006-2012  
Revenue Structure of Chenzhou Mining Group by Product, 2007-2012  
Output of Chenzhou Mining Group by Product, 2008-2012  
Revenue of Chenzhou Mining Group by Region, 2009-2012  
R&D Costs and % of Total Revenue of Chenzhou Mining Group, 2009-2012  
Tungsten Resource Reserves of Chenzhou Mining Group, 2009-2012  
Production and Sales Volume of Tungsten Products and Output-Sales Ratio of Chenzhou Mining Group, 2008-2012  
Gross Margin of Tungsten Products of Chenzhou Mining Group, 2006-2012  
Revenue and Net Income of Chenzhou Mining Group, 2012-2015E  
Net Assets and Net Income of Key Tungsten Product Manufacturing Companies of China Molybdenum

Revenue and Net Income of China Molybdenum, 2007-2012  
Revenue Structure of China Molybdenum by Product, 2009-2012  
Revenue of China Molybdenum by Region, 2009-2012  
Gross Margin of China Molybdenum by Product, 2009-2012  
R&D Costs and % of Total Revenue of China Molybdenum, 2009-2012  
Proposed Projects with Raised Funds and Product Capacity of China Molybdenum, 2012  
Retained Reserves of Mines of China Molybdenum by Product, 2012  
Tungsten Concentrates Output and Market Share of China Molybdenum, 2009-2012  
Sales Volume, Revenue and Average Unit Price of Tungsten Products of China Molybdenum, 2009-2012  
Revenue and Net Income of China Molybdenum, 2010-2015E  
Key Tungsten Product Manufacturing Subsidiaries of Rising Nonferrous Metals Share  
Revenue and Net Income of Rising Nonferrous Metals Share, 2006-2012  
Revenue Structure of Rising Nonferrous Metals Share by Product, 2009-2012  
Revenue of Rising Nonferrous Metals Share by Region, 2009-2012  
Gross Margin of Rising Nonferrous Metals Share by Product, 2009-2012  
Mineral Resources of Rising Nonferrous Metals Share  
Revenue and Net Income of Rising Nonferrous Metals Share, 2010-2015E  
Key Tungsten Product Manufacturing Subsidiaries of Hunan Nonferrous Metals Holding Group  
Revenue and Net Income of Hunan Nonferrous Metals Holding Group, 2006-2012  
Total Assets and Net Assets of Hunan Nonferrous Metals Holding Group, 2006-2012  
Operating Revenue of Hunan Nonferrous Metals Holding Group by Business, 2009-2012  
Sales Volume and Average Selling Price of Hunan Nonferrous Metals Holding Group by Mine Area, 2009-2012  
Sales Volume and Average Selling Price of Hunan Nonferrous Metals Holding Group by Product, 2009-2012  
Operating Revenue and YoY Growth Rate of Hunan Nonferrous Metals Holding Group, 2010-2015E  
Key Tungsten Product Manufacturing Subsidiaries of Jiangxi Tungsten Industry Group  
Revenue and Profits & Taxes of Jiangxi Rare Earth Metals Tungsten Group, 2009-2012  
Key Tungsten Product Manufacturing Subsidiaries of Jiangxi Rare Earth Metals Tungsten Group  
Revenue and YoY Growth Rate of Jiangxi Rare Earth Metals Tungsten Group, 2009-2012  
Tungsten Product Export Quotas of Jiangxi Rare Earth Metals Tungsten Group, 2008-2013  
Tungsten Related Projects under Construction of Jiangxi Rare Earth Metals Tungsten Group during the National 12th Five-Year Plan Period (2011-2015)  
Revenue of Jiangxi Xiushui Xianglushan Tungsten, 2009-2012

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