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China Tungsten Industry Report, 2012-2015

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Abstracts

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.

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