

Global and China Molybdenum Industry Report, 2012-2015

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Abstracts

In 2012, the global economic growth was weak, the bulk commodity demand was reduced, and the prices generally declined. As a result, the molybdenum market remained in the doldrums, the prices showed a downward trend, and the annual average price was USD 12.74 per pound of molybdenum, a decrease of 17.5% from 2011. At the end of 2012, the supply of molybdenum ore decreased, the demand from steel mills increased, and the molybdenum price began to rise.

In 2012, the global molybdenum output was 229 kilotons and the consumption was 225 kilotons, basically in balance. With the recovery of steel demand since the fourth quarter of 2012, the demand for molybdenum is expected to resume growth. After 2014, some mines currently under construction will start production, such as Chile's Sierra Gorda copper-molybdenum mine (controlled by KGHM and Sumitomo Metal) that is expected to start production in 2014. In addition, Grupo Mexico and Rio Tinto also plan to increase production.

China is a large producer and consumer of molybdenum in the world, and the global increment in the production and consumption of molybdenum in the past two years mainly came from China. In 2012, China produced 92 kilotons of molybdenum (equivalent to metal content), accounting for 40.2% of the global molybdenum output, and consumed 85 kilotons, accounting for 37.8% of the global molybdenum consumption. Due to the national protection on strategic resources, molybdenum resources will be concentrated in large enterprises, and the supply will be effectively controlled.

Global molybdenum producers are mainly concentrated in countries with rich molybdenum reserves such as China, the United States and Chile. Global top 10

molybdenum producers account for 2/3 of the global output. Mineral resources are controlled by major molybdenum companies, and the access to large-quantity and high-quality molybdenum ore resources has become the biggest obstacle to entering the industry.

In 2012, top 10 molybdenum producers accounted for 66.4% of the global output, and the U.S. Freeport was the largest molybdenum producer with a share of 17%, followed by Chile's Codelco and GMexico.

Chinese molybdenum production enterprises are mainly concentrated in the regions with rich molybdenum reserves such as Henan, Shaanxi and Liaoning. Jinduicheng Molybdenum and Luoyang Molybdenum, the owners of world-class molybdenum mines Jinduicheng Molybdenum Mine and Luanchuan Molybdenum Mine respectively, are in the forefront of the world, and ranked fourth and fifth respectively in the world in terms of molybdenum output in 2012.

With six chapters and 89 charts, *Global and China Molybdenum Industry Report, 2012-2015* makes an in-depth analysis of the development background, current status and market pattern of molybdenum industry in China and worldwide, and sheds light on the production, operation and development trend of global molybdenum industry leaders such as FCX and GMexico as well as Chinese enterprises including Jinduicheng Molybdenum and Luoyang Molybdenum.

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