

# Global and China Nickel Industry Report, 2010-2011

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## Abstracts

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In 2010, with the stabilized recovery of LME nickel price, most nickel projects shut down in the financial crisis resumed production. The global output of nickel reached 1.44 million tons in 2010, up 8.4% YoY. Meanwhile, the recovery of downstream sectors such as stainless steel powerfully spurred consumption of nickel. In 2010, the nickel consumption worldwide increased by 19.3% YoY to 1.47 million tons. With the constant advancement of new nickel project construction, the world's output of nickel continues to maintain rapid growth in H1 2011.

The report not only analyzes the status quo of global market but also studies the production, sales, import & export, and price trend concerning China's nickel and ferronickel.

Since 2010, the nickel price in China rose to nearly RMB200,000/ton in March 2011 from initially RMB 150,000/ton. The nickel price experienced volatile decline as of April 2011 and moderate rise in June and July.

The high price of nickel boosted the flourishing of ferronickel industry. In 2010, the output of Chinese ferronickel (inclusive of nickel) amounted to 160 kilotons, up more than 50% YoY. With the construction of new nickel projects in China, the output of ferronickel continues to grow and increase by close to 40% in H1 2011.

Ferronickel is made from lateritic nickel ore by pyrometallurgical process. In recent years, the high growth of ferronickel in China staged a tidal wave of investments in the construction projects of lateritic nickel ores. Now Jinchuan Group, Baosteel, CNMC and

TISCO etc. have invested in and acquired lateritic nickel ores in Indonesia and Myanmar. Meanwhile, the import volume of nickel ore surges year by year. In 2010, China imported 25 million tons of nickel ore sand and concentrates from the Philippines, Indonesia and Australia etc., up 52.4% YoY.

Moreover, the report focuses on four international leading nickel enterprises including Norilsk Nickel, Vale SA, BHP Billiton and Xstrata plc, as well as seven key Chinese enterprises including Jinchuan Group and Jien Nickel Industry, etc.

Norilsk Nickel is the largest nickel manufacturer in the world. In 2010, it produced 297,000 tons of nickel, sharing 20.6% of the global output and ranking first worldwide. In H1 of 2011, affected by the ocean shipping disruption of Russian Branch, the nickel output of Norilsk Nickel declined slightly over the same period in 2010 to 136,000 tons.

Jinchuan Group, the largest nickel producer in China, has the world-class nickel-copper-cobalt resources. To sharpen its competitive edge, the Group acquired Tyler Resources Inc. with CAD 214 million in January 2008, and took 11% equities of Fox Resources, an Australian nickel miner and manufacturer, with USD 15.7 million in March. Then in Sep.2009, the company projected USD 2 million for 51% equity stake of Munali Nickel Mine, the largest nickel ore in Zambia. By the end of 2010, the Group had obtained 64 prospecting permits, with exploration area of 5,061 square kilometers, holding resources with over 1 million tons of nickel, 3 million tons of copper and 60,000 tons of cobalt overseas.

As the largest production base of nickel salt in China, the operating revenue of Jien Nickel Industry registered RMB2.24957 billion in 2010, up 99.7% YoY, of which the revenue from its leading product nickel sulfate rose 98.9% YoY to RMB1.258164 billion; and that from electrolytic nickel reached RMB 162.169 million, up 22.9% YoY.

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