

Research Report on Global and China's Nickel Industries, 2019-2023

<https://marketpublishers.com/r/R7A696B2FEFEN.html>

Date: June 2019

Pages: 50

Price: US\$ 2,600.00 (Single User License)

ID: R7A696B2FEFEN

Abstracts

DESCRIPTION

The proven nickel reserves in China are only about 2.90 million tons, accounting for less than 4% of the global total. Dominated by nickel sulfide ores, China's nickel resources are mainly distributed in Gansu, Xinjiang, Yunnan and Jilin. On one hand, it is difficult and costly to mine nickel in China. On the other hand, China is the world's largest producer of stainless steel. In 2018, the production volume of stainless steel in China reached 26.71 million tons, accounting for 53% of the global total. Therefore, China needs to import a large quantity of nickel every year.

According to CRI, Southeast Asia has rich lateritic nickel ores and the mining costs there are low. Neighboring China, the world's largest nickel consumer, Indonesia and the Philippines have become global leading suppliers of nickel resources. The production volume of nickel ores in the two countries account for more than 30% of the global total. Currently, over 90% of China's lateritic nickel ore imports are from Indonesia and the Philippines. In 2013, China's nickel ore imports from Indonesia reached the peak of 41 million tons. From 2015 to 2016, as the Indonesian government restricted nickel ore exports, China almost imported no nickel ores from Indonesia and turned to import nickel ores from the Philippines. From 2014 to 2016, China imported over 30 million tons of nickel ores from the Philippines every year. In 2017, as the Philippines shut down some nickel mines for environmental protection, local nickel ore production and nickel ore exports to China both declined. In the same year, as Indonesia relaxed its policy on nickel ore exports, its nickel ore exports to China increased. It is noteworthy that, to respond to the Indonesian government's restrictions on crude ores, many Chinese nickel producers have invested in Indonesia's ferronickel industry with expanding production capacity. From 2018 to 2019, the production

capacity of nickel in Indonesia sees exponential growth. Before the subsequent stainless steel projects are put into operation, most ferronickel products will be transported to China. The annual production capacity of China-funded ferronickel projects in Indonesia has exceeded 3 million tons.

In 2017, the Indonesian government started to encourage foreign enterprises to build smelters in Indonesia by allowing the export of ores with less than 1.70% nickel content. As it is costly to smelt ores with less than 1.70% nickel content in Indonesia, such ores are usually exported. The policy stipulates that enterprises that have smelters in Indonesia can apply for nickel ore export quotas, which marks the resumption of nickel ore exports in Indonesia. In 2017, Indonesia's nickel ore exports to China reached about 3.84 million tons.

Indonesia's ferronickel exports to China have obvious cost advantages. In recent years, the proportion of Indonesian ferronickel in China's ferronickel imports keeps picking up. In 2018, the proportion reached about 80%. The influx of Indonesian NPI press China's domestic ferronickel factories. And the increasingly stringent environmental protection policies also restrict the production of some domestic ferronickel enterprises. As NPI supply in China increases markedly because of increasing ferronickel imports, China's ferronickel market will be saddled with excessive supply.

In 2018, stainless steel accounted for about two thirds of global nickel consumption. In China, this proportion exceeded 80%. Driven by environmental protection and consumption upgrade, China's stainless steel industry is accelerating industrial upgrade by replacing 200 series with 300 series. In this context, it has an increasing demand for nickel in recent years. It is expected that from 2019 to 2023, the demand from stainless steel will dominate global nickel consumption. However, with the fast development of the electric vehicle industry, the demand from li-ion batteries will increase sharply and take up a larger proportion.

Topics covered:

Overview of global and China's nickel industries

Analysis on the industry chain of nickel

Analysis on nickel import and export in China

Major nickel producers in China and the world

Price trend of nickel

Major driving forces and market opportunities for the nickel industry from 2019 to 2023

Prospect of China's nickel industry from 2019 to 2023

Contents

1 RELEVANT CONCEPTS OF THE NICKEL INDUSTRY

- 1.1 Definition and Classification of Nickel
 - 1.1.1 Physicochemical Characteristics of Nickel
 - 1.1.2 Major Uses of Nickel
- 1.2 Analysis on Global Nickel Industry
 - 1.2.1 Nickel Reserves
 - 1.2.2 Production Capacity and Production Volume
- 1.3 Methodology
 - 1.3.1 Parameters and Assumptions
 - 1.3.2 Data Sources
 - 1.3.3 About CRI

2 ANALYSIS ON CHINA'S NICKEL INDUSTRY, 2018-2019

- 2.1 Development Environment for China's Nickel Industry
 - 2.1.1 Economic Environment
 - 2.1.2 Policy Environment
- 2.2 Analysis on Nickel Supply in China
 - 2.2.1 Production Capacity of Nickel in China
 - 2.2.2 Production Volume of Nickel in China
 - 2.2.3 Production Volume of Nickel Pig Iron (NPI)
 - 2.2.4 Production Volume of Nickel Sulfate
- 2.3 Analysis on Nickel Demand in China
 - 2.3.1 Major Downstream Industries of Nickel in China
 - 2.3.2 Nickel Demand in China
 - 2.3.3 Nickel Demand for the Stainless Steel Industry
 - 2.3.4 Nickel Demand from the Li-ion battery Industry
- 2.4 Analysis on Nickel Import in China, 2013-2018
 - 2.4.1 Nickel Ore Import in China
 - 2.4.2 Major Sources of China's Nickel Ore Imports
 - 2.4.3 Ferronickel Import in China
 - 2.4.4 Major Sources of China's Ferronickel Imports
- 2.5 Analysis on Nickel Export in China, 2013-2018

3 COMPETITION IN CHINA'S NICKEL INDUSTRY, 2018-2019

3.1 Barriers to Entry in China's Nickel Industry

- 3.1.1 Policy Barrier
- 3.1.2 Fund Barrier
- 3.1.3 Barrier of Economy of Scale
- 3.1.4 Resource Barrier

3.2 Competitive Structure of China's Nickel Industry

- 3.2.1 Bargaining Power of Suppliers of Raw Materials (Nickel Ores)
- 3.2.2 Bargaining Power of Consumers
- 3.2.3 Competition in the Nickel Industry
- 3.2.4 Potential Entrants to the Nickel Industry
- 3.2.5 Substitutes for Nickel

4 MAJOR NICKEL PRODUCERS IN CHINA AND THE WORLD, 2018-2019

4.1 Major Nickel Producers in the World

- 4.1.1 Vale S.A.
- 4.1.2 Norilsk Nickel
- 4.1.3 Glencore plc
- 4.1.4 BHP Billiton Ltd.
- 4.1.5 Anglo American plc
- 4.1.6 Sumitomo Corporation
- 4.1.7 Western Areas Ltd
- 4.1.8 Lundin Mining Corp
- 4.1.9 Terrafame Ltd

4.2 Major Nickel Producers in China

- 4.2.1 Jinchuan Group Co., Ltd.
- 4.2.2 Xinjiang Xinxin Mining Industry Co., Ltd.
- 4.2.3 Guangxi Yinyi Advanced Material Co., Ltd.
- 4.2.4 Yantai Cash Industrial Co., Ltd.
- 4.2.5 Zhejiang Huayou Cobalt Co., Ltd.
- 4.2.6 Tianjin Maolian Technology Co., Ltd.
- 4.2.7 Jilin Jien Nickel Industry Co., Ltd.
- 4.2.8 Jiangxi Jiangli Sci-Tech Co., Ltd.
- 4.2.9 Chengdu Huaze Cobalt & Nickel Material Co., Ltd.
- 4.2.10 Shenzhen GEM High-tech Co., Ltd.

5 ANALYSIS ON PRODUCTION COSTS AND PRICES OF NICKEL IN CHINA, 2016-2019

5.1 Analysis on Production Costs of Nickel in China

5.1 Analysis on Prices of Nickel in China

5.2.1 Electrolytic Nickel

5.2.2 Ferronickel

5.2.3 Nickel Sulfate

6 FORECAST ON DEVELOPMENT OF CHINA'S NICKEL INDUSTRY, 2019-2023

6.1 Factors Influencing Development of China's Nickel Industry, 2019-2023

6.1.1 Driving Forces and Market Opportunities

6.1.2 Threats and Challenges

6.2 Forecast on Nickel Supply in China, 2019-2023

6.2.1 Forecast on Production Capacity and Production Volume of Nickel

6.2.2 Forecast on Structure of Nickel Products

Selected Charts

SELECTED CHARTS

Chart Global Production Volume of Nickel, 2014-2023F
Chart Production Volume of Stainless Steel in China and the World, 2014-2023F
Chart Production Volume of Electric Vehicles in China and the World, 2014-2023F
Chart Policies on China's Nickel Industry
Chart Production Volume of Electrolytic Nickel in China, 2013-2018
Chart Production Volume of NPI in China, 2013-2018
Chart Production Volume of Nickel Sulfate in China, 2013-2018
Chart Import Volume of Nickel Ores in China, 2013-2018
Chart Sources of China's Nickel Ore Imports in 2018
Chart Import Volume of Ferronickel in China, 2013-2018
Chart Major Sources of China's NPI Imports in 2018
Chart Concentration Ratio of High-nickel Pig Iron Factories in China, 2016-2018
Chart Price Trend of Nickel Ores in China, 2016-2018
Chart Price Trend of Electrolytic Nickel in China, 2016-2019
Chart Price Trend of NPI in China, 2016-2019
Chart Price Trend of Nickel Sulfate in China, 2016-2019
Chart Forecast on Production Volume of Nickel in China, 2019-2023

I would like to order

Product name: Research Report on Global and China's Nickel Industries, 2019-2023

Product link: <https://marketpublishers.com/r/R7A696B2FEFEN.html>

Price: US\$ 2,600.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/R7A696B2FEFEN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

****All fields are required**

Customer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970