




**2009年中国电解锰工业的回顾
和2010年展望**
**Review of China's EMM
Industry in 2009 and Outlook for
the Industry in 2010**

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❖ 一、2009年电解锰工业回顾

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- ❖ (三) 技术进展
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2009年回顾——基本概要 basic facts/summary

❖ 2008年8—9月爆发的全球金融危机不仅重创了金融业,也对全球实体经济带来了严重的冲击。The global financial crisis broke out in Aug. and Sept, 2008 not only greatly impacted the financial industry, but also the global economy at large.

❖ 中国电解锰工业不可避免也受到了冲击,出口量急剧减少,价格大幅下跌,2009年1—4月价格曾下跌到RMB1.2万元/吨左右,跌破了多数企业的成本线,近60%的企业一度被迫停产。

Inevitably, China's EMM industry was also greatly impacted. Its export volume suffers a sharp decline and the EMM price also slumped by a large margin, even to a record low of 12k/ton in Jan. to April, 2009. Such a record low price is even lower than the cost of the majority manufacturers, which has forced 60% of them to stop production.

在中国政府采取的“一揽子”经济刺激计划的推动下,基础设施和惠民工程陆续开工,拉动了钢铁工业的发展,从而也带动了电解锰工业复苏。

- ❖ With the launch of economic stimulus package by the Chinese government, many infrastructure and public welfare project are initiated, which promote the development of the steel industry and thus the recovery of EMM industry.

2009年回顾——基本概要

- ❖ 中国电解锰工业的复苏之路:

China's EMM Industry on recovery path

- ❖ **2009年5月开始，电解锰产销量逐月大幅增加,价格也稳步上升。**

From May, 2009, the production and sales volume of EMM have been increasing significantly month by month and its price is also on steady growth.

- ❖ **2009年6月，全行业开工率已上升到70%以上。**

In Jun, 2009, the operating rate across the industry has jumped to over 70%.

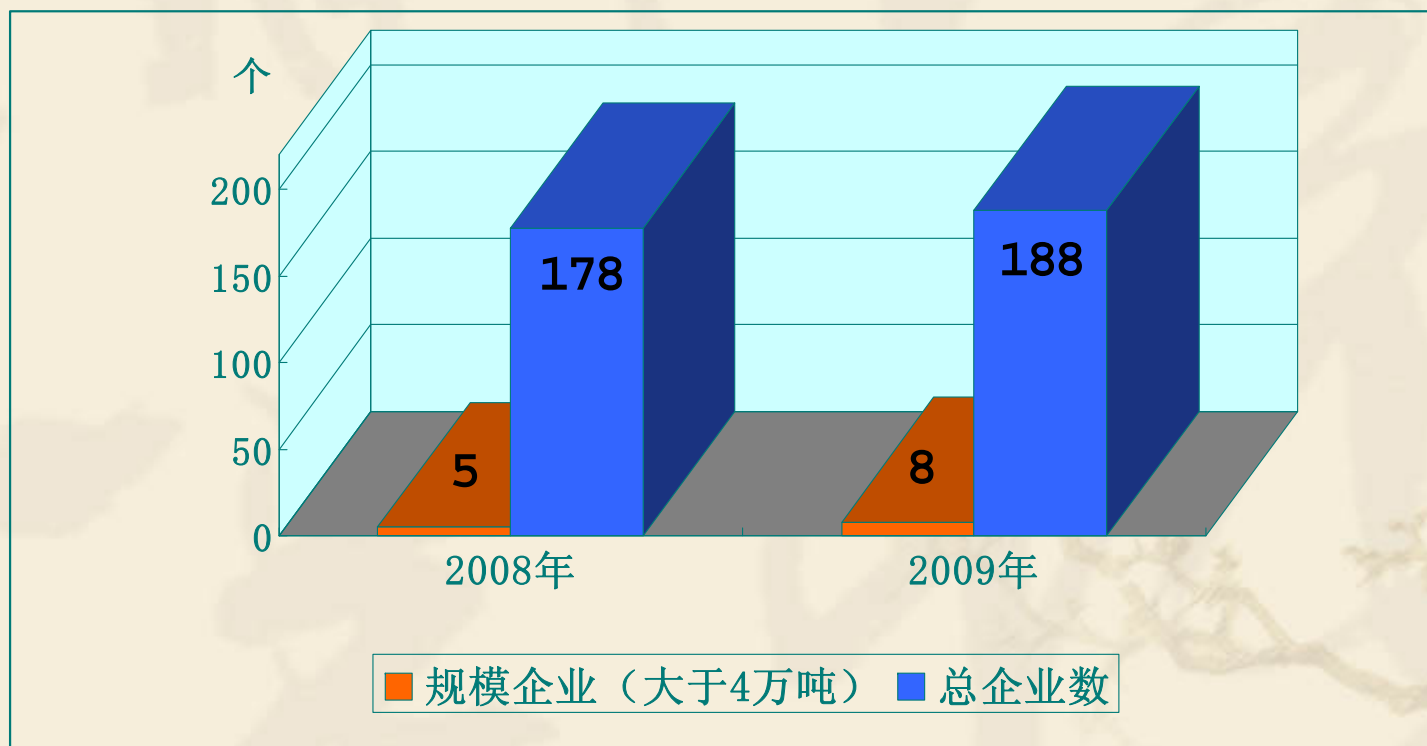
- ❖ **2009年7月，全行业开工率达到85%以上。**

- ❖ **因此,2009年中国电解锰产量仍达到了129万吨,比2008年增产14%。中国电解锰工业取得了应对国际金融危机的初步胜利。**

Consequently, the output of China's EMM in 2009 still reached 1,290 K, increased by 14% than 2008. China's EMM industry has won the initial success in tackling the global financial crisis.

2009年回顾——核心数据（企业数） 13个？

- ❖ 2009年投入生产企业数量大幅增加： enterprise in production
2009年电解锰生产企业数增加33个；其中产能突破4万吨的企业数增加3个。The number of EMM manufacturers in production increase by 33, among which there are 3 newly added enterprise with over 40 K-output capability.



2009年回顾——核心数据（产能产量）

capacity & output

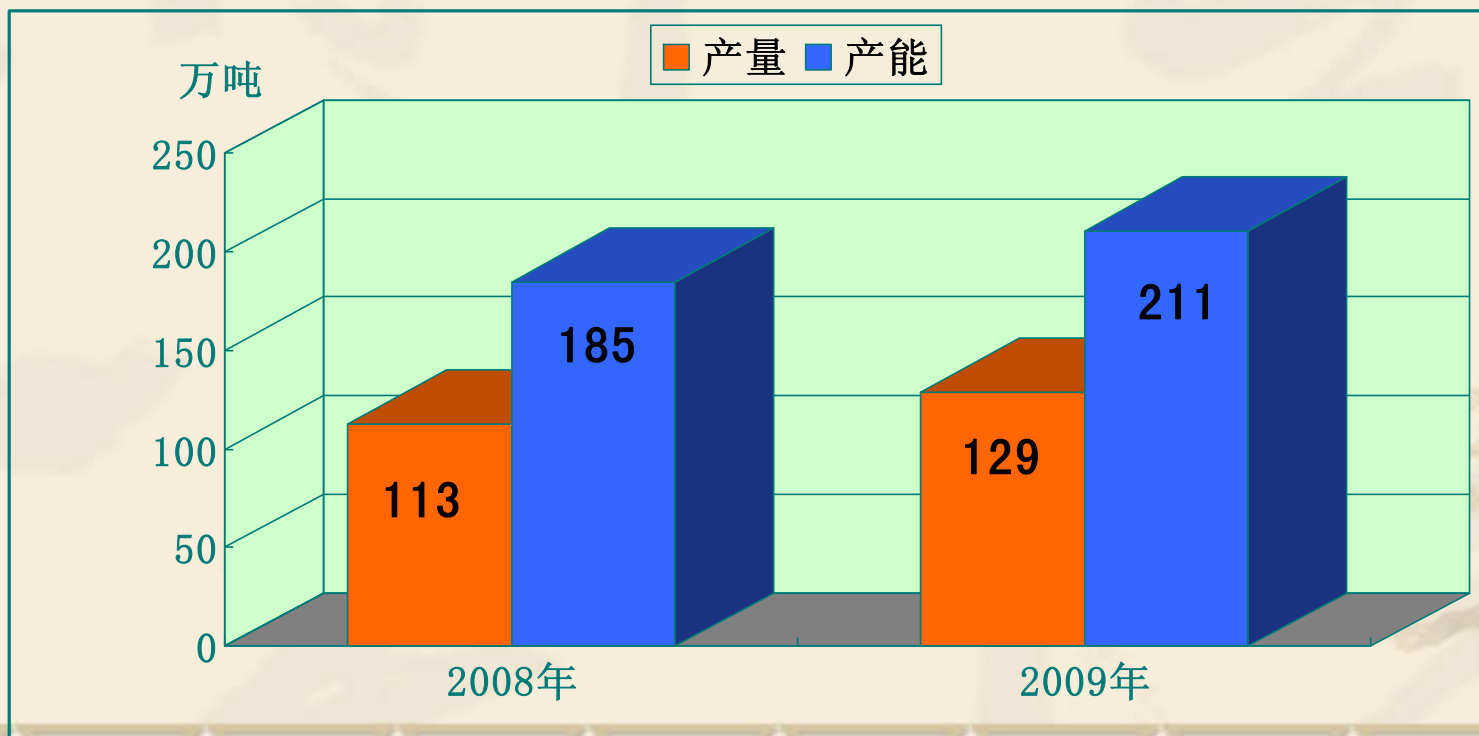
❖ 2009年电解锰工业实现了快速增长

the EMM industry witnessed rapid growth in 2009

电解锰生产能力增长14.2%； 电解锰产量增长14.1%。

1,850K to 2,110K

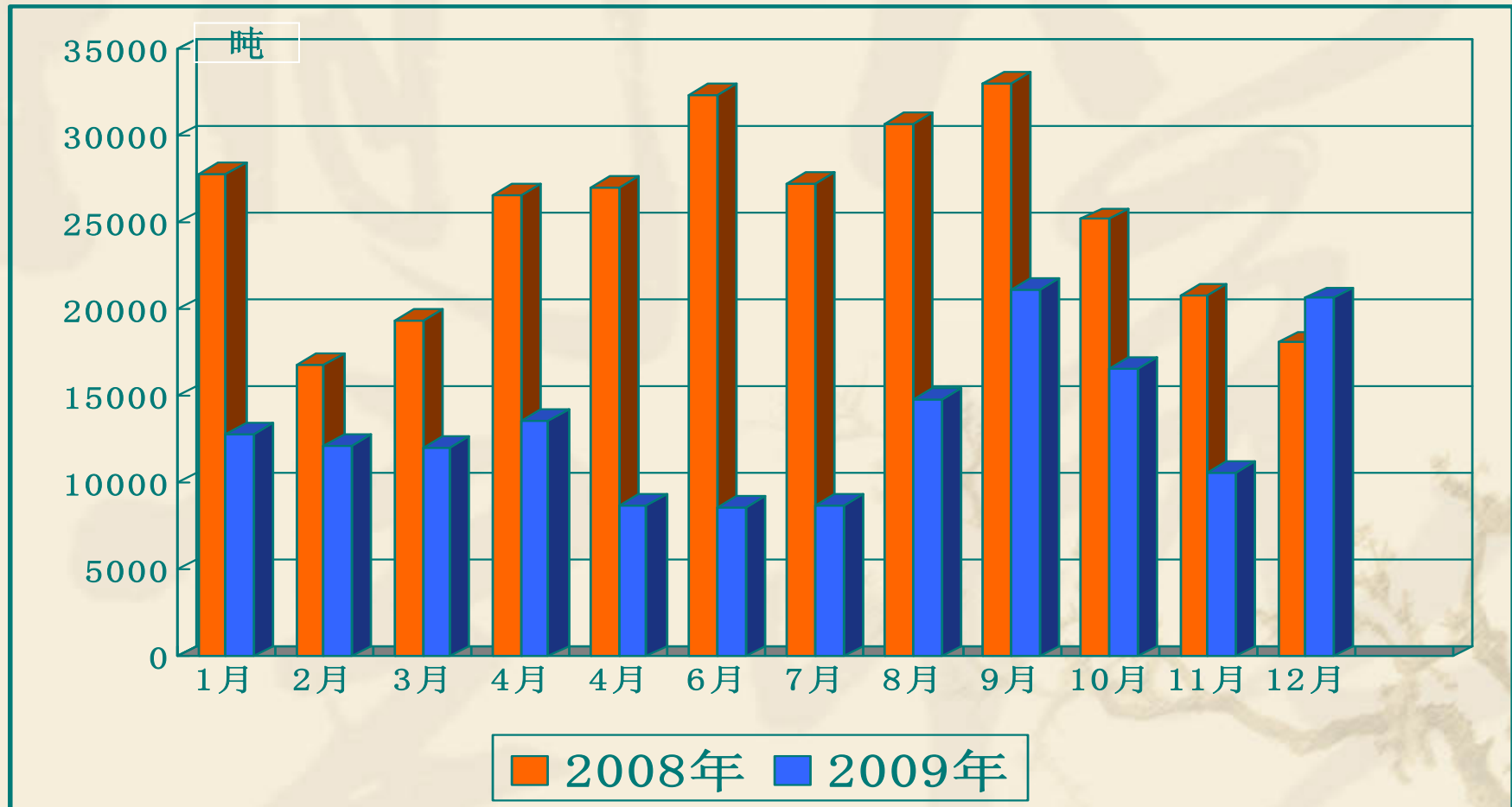
1,130K to 1,290K



2009年回顾——核心数据（出口量） export

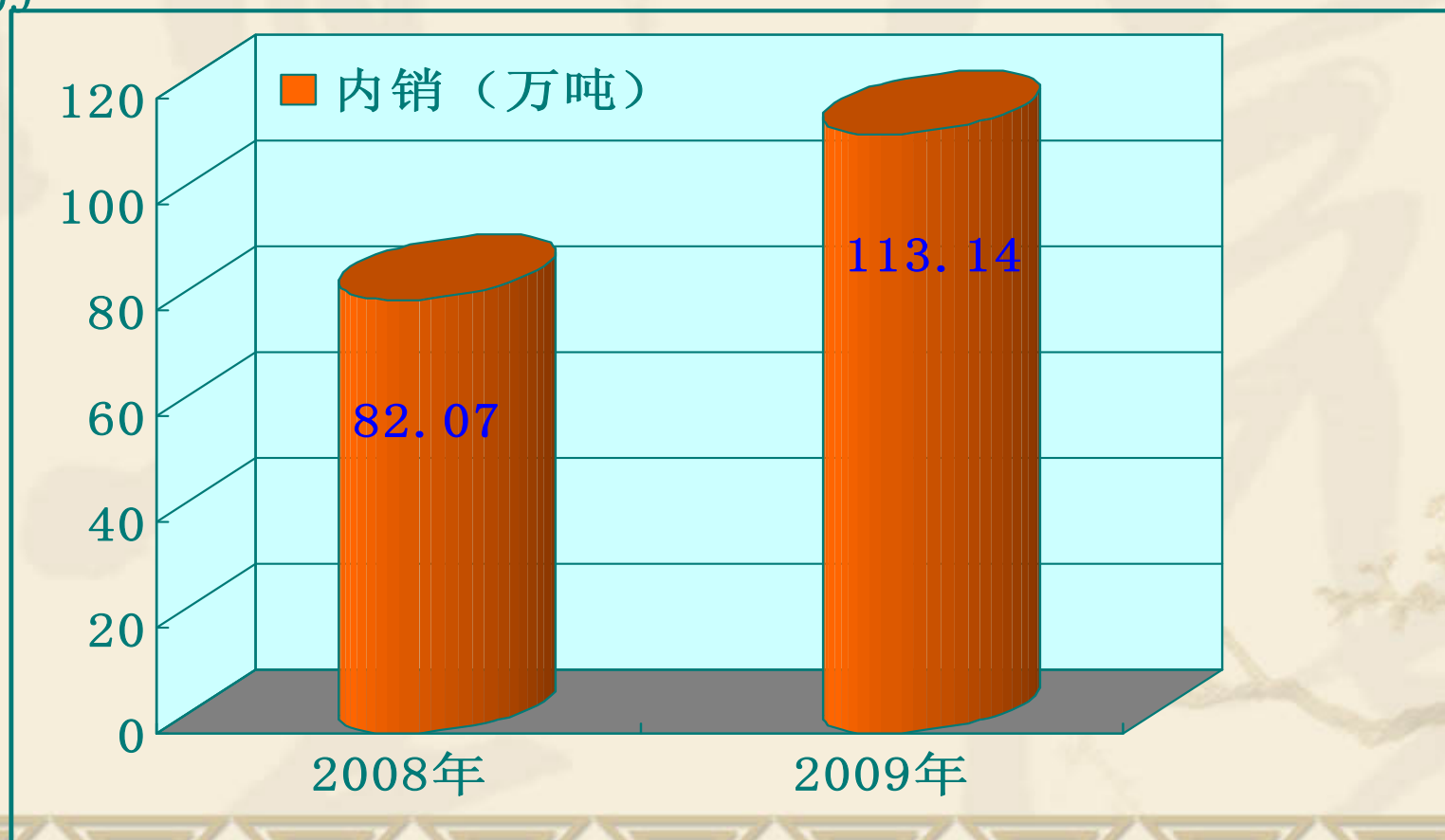
volume

2009年电解锰出口量大幅减少，出口量为**15.46万吨**，同比**下降50%以上**
Decline by a large margin at 154,600 tons, down by 50% compared with 2008



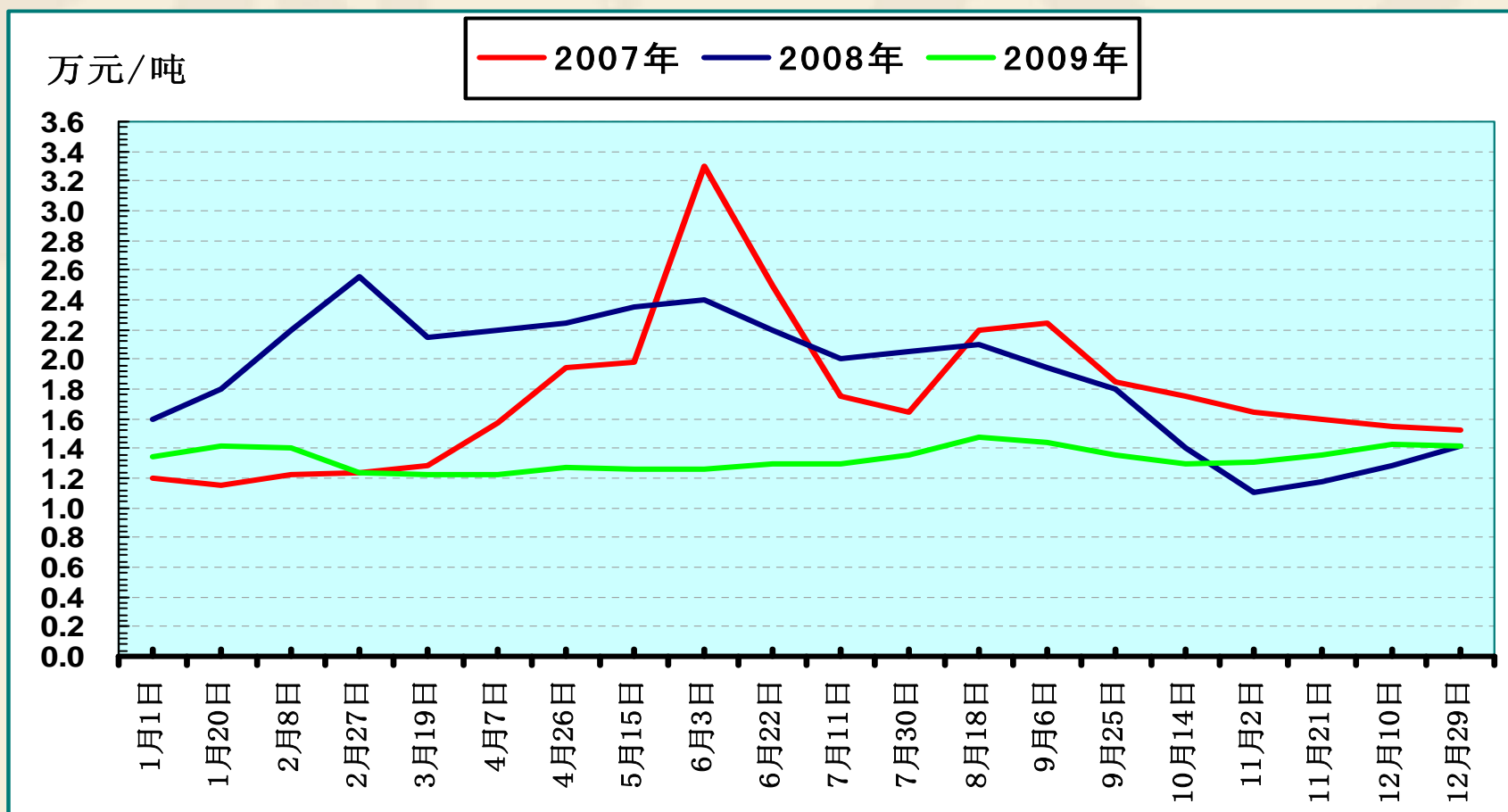
2009年回顾——核心数据（内销量） domestic sales volume

❖ 2009年电解锰内销量大幅增加，由2008年的82.07万吨，增加到2009年的113.14万吨，增幅高达38%。Witness a sharp increase in 2009 by 38%, from 820,700 tons in 2008 to 1,131,400 tons in 2009



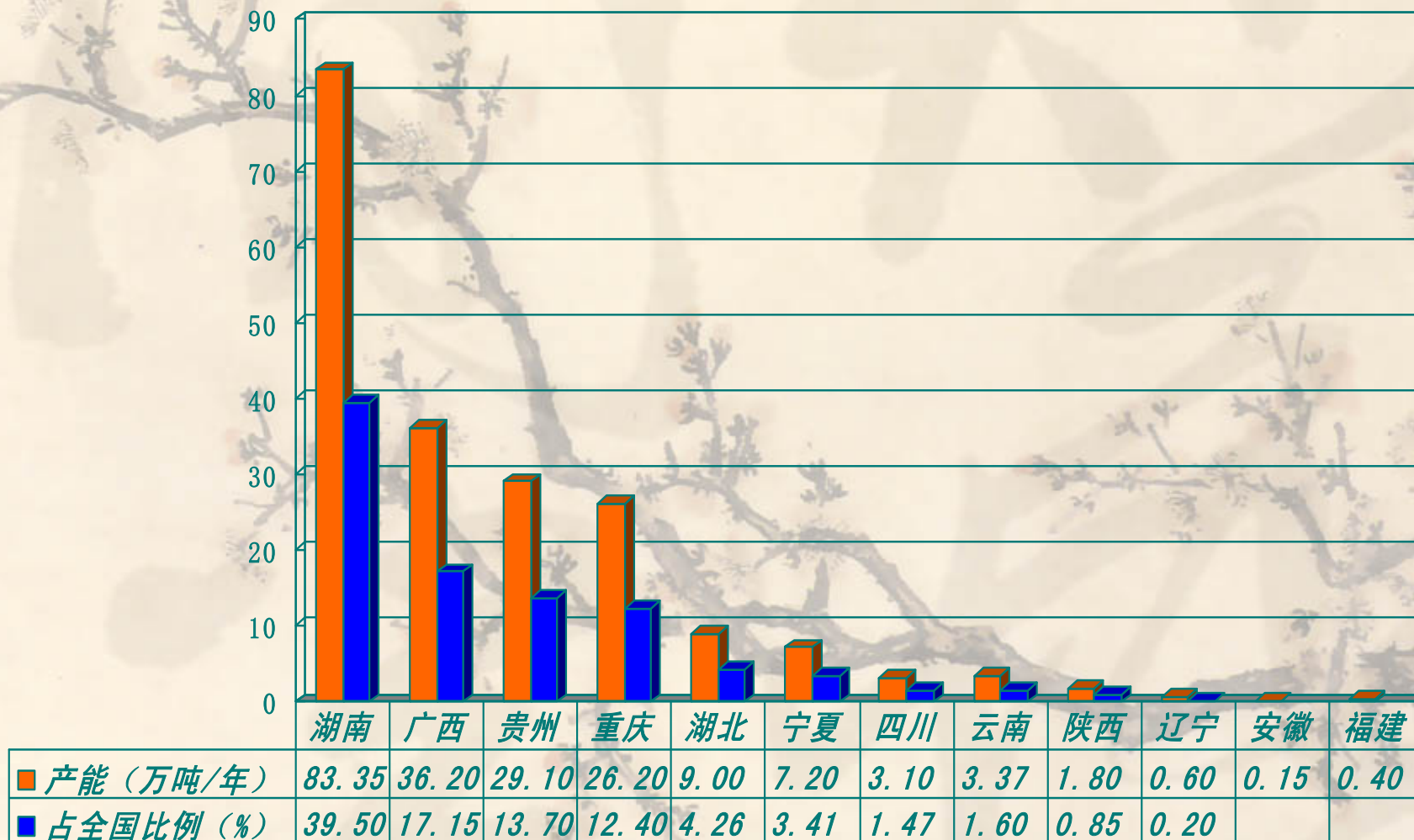
2009年回顾——核心数据（市场价格）

- ❖ 2009年电解锰市场价格运行平稳。Price of EMM in 2009 maintains at a steady level



2009年回顾——核心数据（工业布局）

Geographical distribution of the Industry



❖ 2009年回顾——核心数据（重点产区） Main production Area

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序号	产区	生产能力(万吨/年)	产量(万吨)
1	重庆秀山	21.90 219K ton Per annum	18.60 186K
2	湖南花垣 Yuan	19.60 196K	17.10 171K
3	湖南泸溪	18.22 182,200	12.91 129,100
4	贵州松桃	13.80 138K	10.83 108,300

❖ 2009年回顾——技术进展 technology development

- ❖ 2009年一批新材料、新设备得到应用,节能、降耗、环境保护效果非常明显,HC—1700磨粉机、工程塑料电解槽、阳极液断流器等。

A number of new material and equipments are applied in production, like HC—1700 pulverizer, plastic electro bath and **anolyte** current-breaker, etc, which has generated obvious improvements in terms of energy reservation, consumption reduction and environmental protection.

- ❖ 氧化锰还原新工艺试验、新型阴、阳极板、废渣回收锰和废渣制砖以及机械提板、洗板、剥离自动控制设备等均在工业规模抓紧进行试验。

Moreover, many new technique or equipments are currently under testing for applying in large scale across the industry, including new Mn oxide reduction technique, new anode and cathode plates, new technique of recovering Mn from scoria, technique in making bricks from scoria, ?, plate washing, automatic peeling control equipment, etc.

- ❖ 这些技术均有望在2010年二、三季度取得突破。

These techniques are expected to make great breakthrough in the 2rd, or 3rd quarter in 2010.

- ❖ 世界经济已进入后金融危机时代,要在后危机时代竞争中抢占制高点,转变增长方式,加快技术改造力度,是中国电解锰工业发展刻不容缓的首要任务。Now the global economy has entered the post-financial crisis era. To gain a favorable position in the post-crisis competition, to shift the growth pattern of the industry and to accelerate the technology improvement pace are the three main priorities in the development of China's EMM industry.

❖ 2009年回顾——主要问题 Review of the main problems in the industry in 2009

- ❖ 产能过剩严重，原料供应不足：主要原材料及电价不断上涨，中国电解锰工业正在陷入产能增加而效益下降的困境。碳酸锰矿资源无论是数量还是质量都越来越难于满足中国电解锰工业不断增长的巨大需求。 Surplus in production capacity & insufficiency in raw material supplies: The price of raw material and electricity goes up and up. As a result, China's EMM industry gets into a difficult position of surplus capacity and declined efficiency. Neither the quantity nor quality of the manganese carbonate ore resources can satisfy the ever-increasing demand of China's EMM industry.



- ❖ 技术经济指标差：依靠科技进步,加大技术改造力度,转变增长方式目前仅限于少数大型企业,多数中、小企业技术改造力度小,设备陈旧落后。节能、减排任务仍很艰巨,尤其是生产废水零排放绝大多数企业尚未实现。

Poor tech-economic index: Only a few large enterprises rely on technology innovation, technique reengineering to shift their growth pattern. But most small and medium enterprises have done little in improving their production technique and the equipment they use are still very backward. Thus energy conservation and emission reduction are still a very challenging task for the industry. In particular, overwhelming majority of the enterprises in the industry are yet to fulfill the goal of zero emission of waste water from production.

- ❖ 企业集中度仍然很低。前四名企业总产能不足全国总能力的15%,远低于30—40%的要求。

concentration ratio of the industry is still very low: the total production capacity of the top four enterprises accounts for less than 15% of the total national capacity, far below the required ratio of 30 to 40%



二、2010年电解锰工业展望

Outlook on the EMM industry in 2010



2010年电解锰工业展望——复杂但充满信心

1. the future is complicated yet we are full of confidence

- ❖ 极其困难的2009年已经过去, 迎来了复杂的2010年, 全球金融危机尚未过去, 动荡不定的全球经济复苏还面临诸多困难, 中国电解锰工业面临的问题不会比2009年少, 个别问题甚至更加严重。The very tough year of 2009 has passed, now we embark on the complicated new year of 2010. The future is complicated in that the global financial crisis is not yet fully terminated and there are still lots of difficulties ahead for the recovery of the still very unstable global economy. And the problems that China's EMM industry confronts will be no less than that of 2009. Some of the problems will get even worse.
- ❖ 但是根据多年积累的经验和技术进步所取得的成果, 尤其是200系不锈钢在中国的飞速发展, 我们仍然可以对2010年取得更好的成绩充满信心。However, based on the rich experience we accumulate over the years and the positive results in technology innovation, especially the rapid development of 200 series stainless steel in China, we have every confidence that we can still make greater achievements in 2010.

2010年电解锰工业展望—200系不锈钢市场巨

2. There is huge market demand for 200 stainless steel

- ❖ 200系不锈钢经几年科技攻关,产品质量已大幅提高,部分品种的综合性能已接近304,因此200系不锈钢在中国发展非常迅速,生产能力已超过600万吨,仅福建吴航不锈钢公司将达到300万吨规模,2009年的实际产量最保守的数字应超450万吨,远远超过印度而成为全球200系不锈钢第一大生产国,今年肯定会超500万吨。200系不锈钢在中国的大发展为电解锰提供了巨大而可靠的市场。

After several years of technology research, the product quality of 200 series stainless steel has been greatly improved. The properties of some products have been very close to that of 304 series. Now 200 has witnessed a rapid development in China, with a production capacity of over 6 million tons. Fujian Wuhang Stainless Steel Corporation alone has a production capacity of 3M. The actual output of China in 2009 is over 4.5M tons at the most conservative estimation, which is far ahead of India and makes China the largest producer of 200. This year's total output is estimated to be over 5M tons. The sound development of 200 SS has provided huge and reliable market demand for EMM.

2010年电解锰工业展望——出口转向内需

3. Shifting focus from export to domestic demand

- ❖ 我国电解锰市场从2005年开始逐年由出口为主转向内销为主,出口量由90%逐步降低,到2009年,出口量只占生产量的12%,因此国际市场的变化对中国电解锰的市场影响已经很小,中国电解锰的生产已经由出口为主而转变为内需为主,这是一个非常重大的转变,是我们2009年比较顺利渡过全球金融危机的最根本的原因,更是我们今后自主发展决定中国电解锰命运的重大抉择。
- ❖ Since 2005, China's EMM market has gradually shifted its focus from export to domestic sales, with the export volume steadily declining from a high level of 90% to a mere 12% in 2009. Therefore, the change in the international market now has little influence on China's EMM market. Such a shift of focus is a significant change in China's EMM industry and is also the most fundamental reason for us to survive in the global financial crisis. Moreover, it is also a very crucial choice for the development of China's EMM industry with our own efforts.

2010年电解锰工业展望—新技术新工艺有力支撑

4. the strong support of new technology and technique

- ❖ 一批新材料、新设备和新工艺的成功应用为中国电解锰工业的发展提供了强有力的支持,实现了节能、降耗、环保和降低生产成本,提高了电解锰的竞争力。中国电解锰工业虽然实现了由外销为主到内销为主的转变,但是无论国际、国内都将面临中、低碳锰铁和电热法金属锰的激烈竞争,只有不断提高质量,不断降低生产成本才有可能真正实现持续、稳定、健康的发展。
- ❖ The successful application of a group of new material, equipment and techniques have provide very strong support for the development of China's EMM industry, which will help to fulfill the goals of energy reservation, consumption reduction and environmental protection and to enhance the competitiveness of EMM. Although China's EMM industry has shifted its focus from export to domestic sales, both the domestic international market will witness the fierce competition between medium/low carbon ferromanganese and electro-thermic manganese metal. Thus only by continuously raising quality and constantly reducing production cost can the sustainable, stable and healthy development of China's EMM industry become possible.

2010年电解锰工业展望——产业集中度加快提高

5. Rapid increase of the concentration ratio

- ❖ 企业集中度今年将会继续提高,中信大锰、湖北宏信集团、宁夏天元、金瑞新材料公司、天雄集团、松桃三和、重庆武陵等公司都在积极进行技改扩建,中信大锰跨过10万吨后正在向20万吨进军,宏信和天元今年将可能实现10万吨的跨越,只有主要企业做大做强,集中度提高以后,中国电解锰工业技术改造力度才会更大,价格也会更趋合理和稳定。
- ❖ **The concentration ration of the industry will further increase.** Citic Dameng Mining, Hubei Hongxin Group, Ningxia Tianyuan, Jinrui New Material Co., Ltd, Tianxiong Group, Songtao Sanhe and Chongqing Wulin, etc., are all actively improving their production technology and expanding their production scale. After exceeding 100,000 tons in its output, Citic Dameng Mining is now heading for the next goal of 200,000 tons. Both Hongxin and Tianyuan may fulfill the goal of 100,000 tons in output this year. Only with the growth of main strong enterprises and the increase of concentration ratio can the technology improvement of EMM industry be enhanced and the price of EMM be maintained at a reasonable and stable level.

2010年电解锰工业展望——淘汰落后将加快

6. unqualified enterprises will be eliminated at a faster speed

- ❖ 2009年由于多方面原因,有17家企业停产,总能力7.4万吨,51家企业比2008年减产,这些企业中近半数装备落后,消耗高,环境保护不达标,如不及时改造将面临被淘汰,加大落后产能的淘汰将是2010年中国电解锰工业转变增长方式的一项主要工作。
- ❖ Due to various reasons, 17 enterprises were forced to cease production in 2009, with a total output of 74K tons. 51 enterprises have reduced their production capacity in 2009. Half of these enterprises are equipped poorly and fail to fulfill the environmental protection standard with high consumption. If they cannot timely improve their production technology, they will be eliminated. To accelerate the elimination of those unqualified manufacturers will be one of the main task for China's EMM industry to shift its development pattern in 2010.

2010年电解锰工业展望—市场价格震荡上行

7. The market price of EMM will fluctuate and go up

- ❖ 今年电解锰价格将会继续保持相对稳定,总体是呈震荡上行,由于全部原材料和电力价格都已大幅上调,多数电解锰企业的生产成本(含税)已逼近1.5万元/吨,少数企业已超过,因此今年电解锰市场主体价格应在1.55—1.65万元/吨范围波动,只有出现重大不测事件才会出现价格更大范围的震荡。
- ❖ The EMM price this year will continue to maintain at a steady level. And the overall trend will be upward in fluctuation. As the price of all raw material and the electricity have been increased by a large margin, the production cost (tax included) of most EMM enterprises have approached 15K RMB per ton. And the cost of a few enterprises have already exceeded 15K. Therefore, the market price of EMM this year will fluctuate between 15,500 to 16,500 RMB per ton. Only the occurrence of major unexpected events can enable the price to fluctuate in a wider range.



谢谢大家！

