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中国国产锰矿供应情况介绍

国际锰协会2015年年会 – 周健



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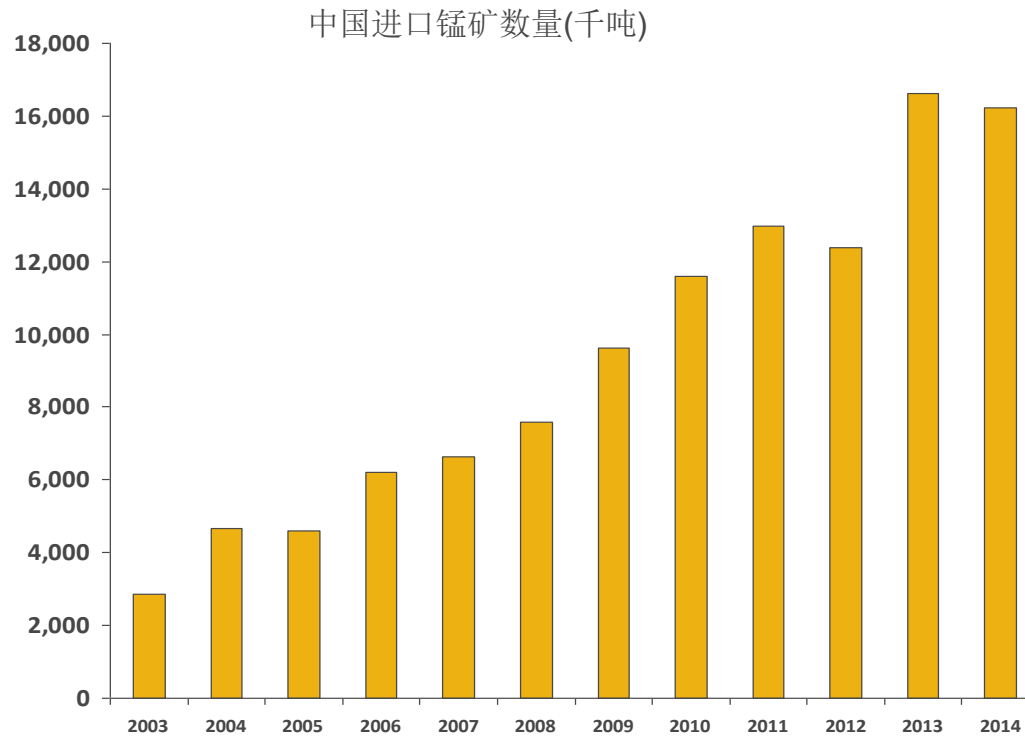
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内容提要

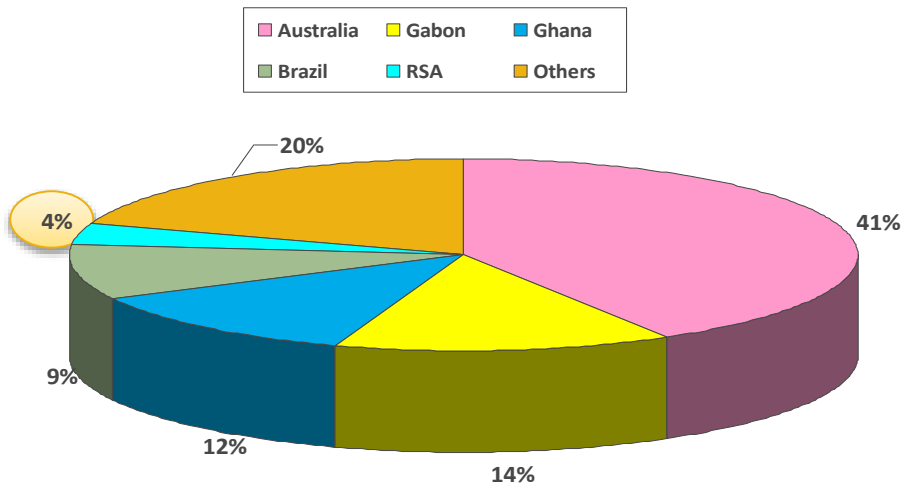
- 中国进口锰矿数量逐年增长
- 国内锰矿产量开始逐渐减少
- 中国主要锰矿山情况简介
- 中国电解锰和锰合金生产的典型配方
- 国产锰矿成本简析
- 国产锰矿未来何去何从

中国进口锰矿数量逐年增长

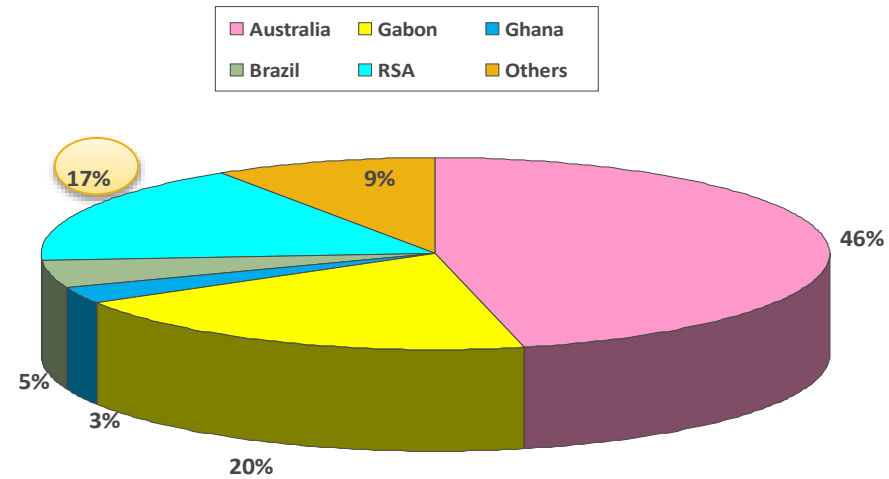


- 中国进口锰矿量的增长主要是因为:
 - 锰合金和电解锰产量的增加
 - **国产锰矿的枯竭**
 - 新建的大型封闭式电炉对原料质量的要求

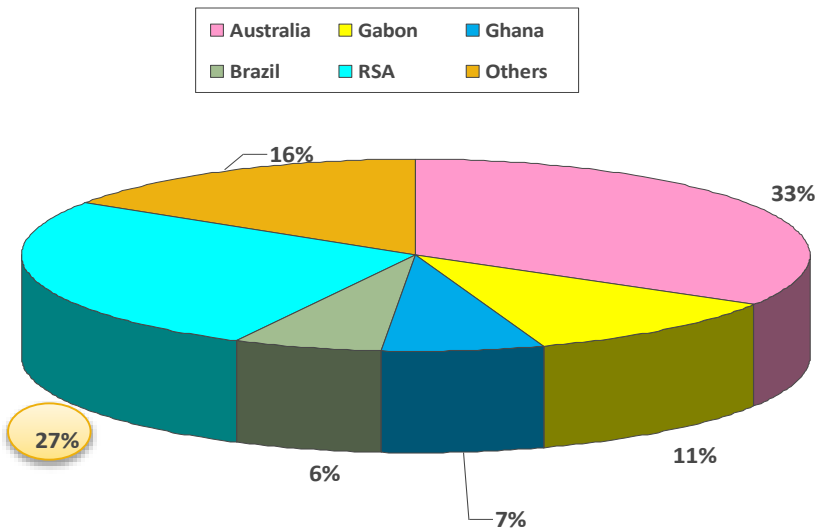
进口锰矿的增量主要来自于南非



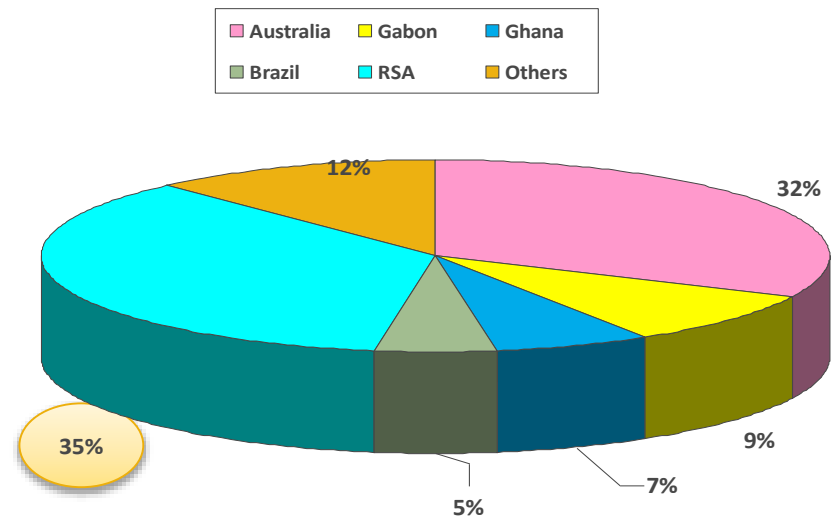
2003



2007



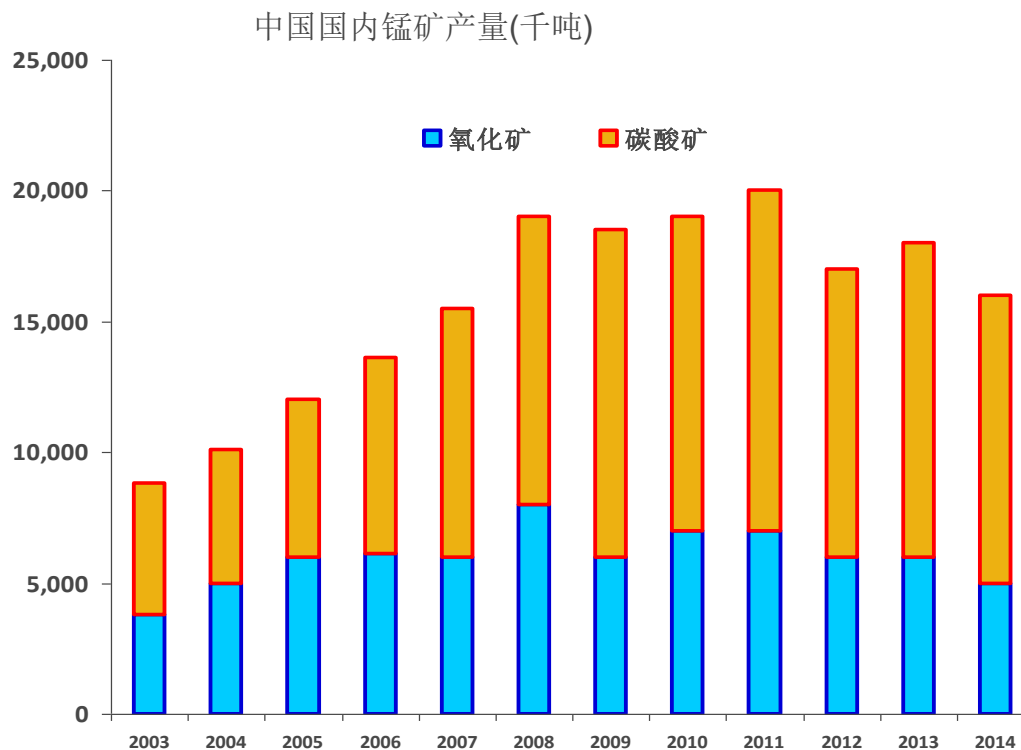
2011



2014



国内锰矿产量开始逐渐减少



- ❑ 现有矿山的枯竭
- ❑ 持续上涨的开采成本
- ❑ 质量和供应不稳定
- ❑ 对于生产能源密集型产品来说使用价值较低

图中国产锰矿产量不包括品位低于15%用于生产富锰渣的国产铁锰矿产量

中国主要锰矿山情况简介

- 根据国土资源部的统计数据，2010年中国锰矿资源量约8.9亿吨，平均品位仅19%，其中碳酸矿占73%。
- 目前国内锰矿年生产能力约2500万吨，但是受市场影响，近几年的实际产量远低于产能。

	规模（年产能）	数量	总产能
大型	>30万吨/年	15	600万吨/年
中型	10-30万吨/年	30	400万吨/年
小型及民采	<10万吨/年	500	1500万吨/年

- 湖南、广西和贵州三省是中国锰矿主要生产区域，它们全都位于中国的西南部。上述三省的锰矿产量约占全国产量的65%。

中国主要锰矿山情况简介

湖南：花垣民乐锰矿、古丈锰矿、永州东湘桥锰矿等

贵州：松桃锰矿、遵义长沟锰矿等

广西：中信大锰、靖西县锰矿等



中国电解锰和锰合金生产的典型配方

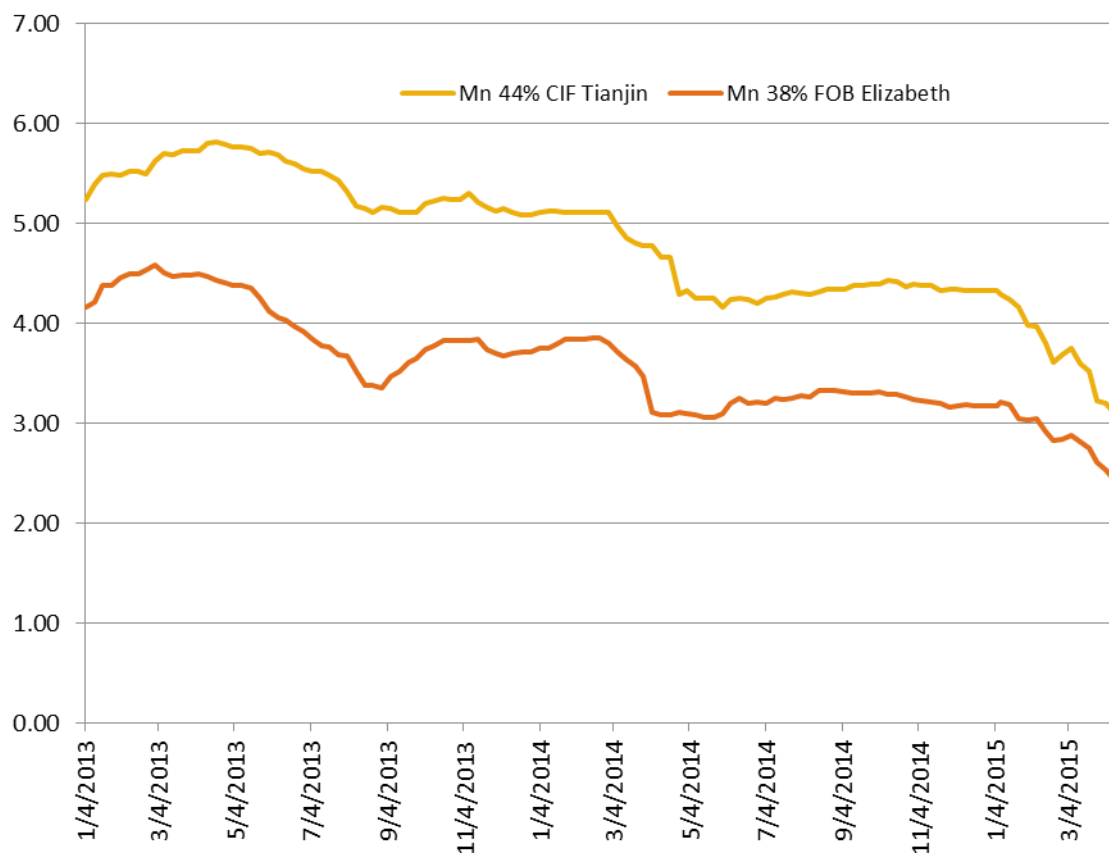
以前

	EMM	70HCFEMN	6517SIMN	6014SIMN
进口氧化矿	0	70%	40%	20%
进口半碳酸矿	0	0	0	0
国内矿	100%	30%	30%	70%
富锰渣	0	0	30%	10%

现在

	EMM	70HCFEMN	6517SIMN	6014SIMN
进口氧化矿	10%	80%	45%	40%
进口半碳酸矿	0	15%	30%	20%
国内矿	90%	5%	15%	35%
富锰渣	0	0	10%	5%

锰矿价格自2013年以来持续下滑



- ❑ 品位44的氧化矿和38的半碳酸矿价差在逐渐缩小
- ❑ 随着进口锰矿价格的下降，国产锰矿如果不能降低价格的话将越来越失去其竞争优势

国产锰矿成本简析

开采成本:
80-200 RMB/MT

地方出境资源税:
80-100 RMB/MT

总成本



+



=

**160-300
RMB/MT**

OR

**1.25-2.37
USD/dmtu**

- ❑ 仅有部分开采成本较低的露天锰矿其开采成本可以控制在80元/吨左右，平均开采成本应该在20-150元/吨。
- ❑ 为保护地方经济的发展，各地方政府对于销售至外地的锰矿都会额外征收所谓的地方资源税以鼓励锰矿企业或其他企业在其境内投资锰矿加工产业。

假设：锰矿品位24%

国产锰矿未来何去何从

一个巨大的问号
?

谢谢!

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