



Zinc Resources Industry Development Research

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OBJECTIVES

- The client is a mineral resource supply chain company that aims to build a reliable, efficient and green resource supply chain for the iron and steel industry. The client was considering investing in zinc resource industry. Thus, the client would like to know the outline of the zinc industry. SMM conducted a research on the market relevant to zinc industry in China in order to help client make more responsible decisions.

PROCESS

- Methodology
 - ▶ In-depth analysis of zinc industry value chain
 - ▶ Supply & demand analysis of zinc resources, refined zinc and zinc products
 - ▶ Cost & Pricing breakdown of zinc and downstream products
 - ▶ Zinc demand forecast via fundamental analysis
 - ▶ Zinc upstream supply forecast based on expansion plan and production suspension/reduction expectations of operating mines
- Sample Size
 - ▶ Mining (15), Smelter (15), End User(10), Other Organizations, e.g. Industry Associations (5)
- Project Time
 - ▶ 8 weeks

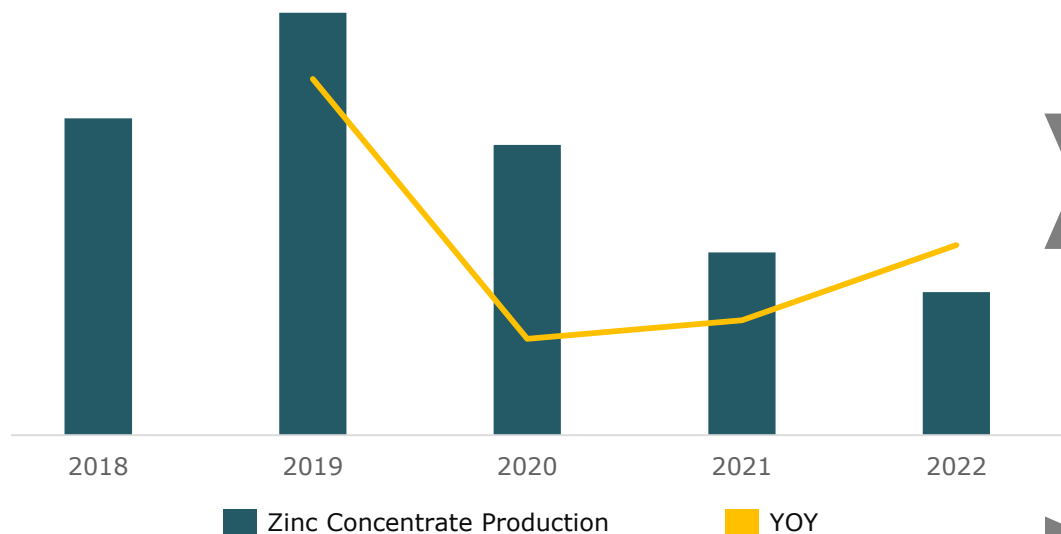
DELIVERABLES

- Historical and current supply and demand balance of zinc resources
 - ▶ Global S&D balance
 - ▶ China domestic S&D balance
- Future zinc supply and demand forecast
 - ▶ Global and domestic estimate of secondary zinc supply
 - ▶ Downstream zinc demand forecast (2022-2032E)
 - ▶ Refined zinc supply forecast (2022-2032E)
 - ▶ Zinc concentrate supply forecast (2022-2032E)
- Study on Benchmark Companies on zinc value chain
- Advice on zinc industry investment

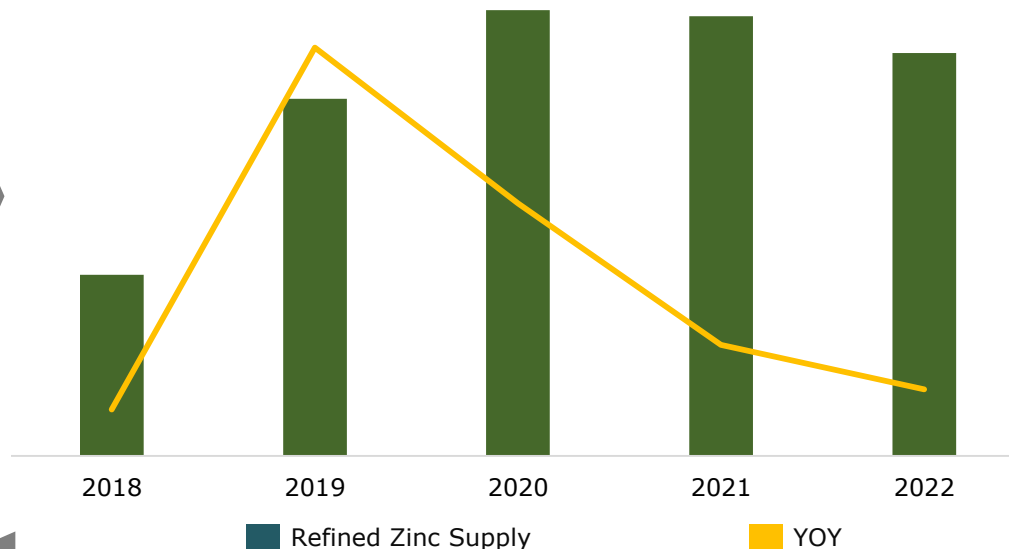
Historical and Current China Domestic Zinc Supply and Demand

Upstream

Historical Production of Zinc Concentrate in China
(kilo metal ton)

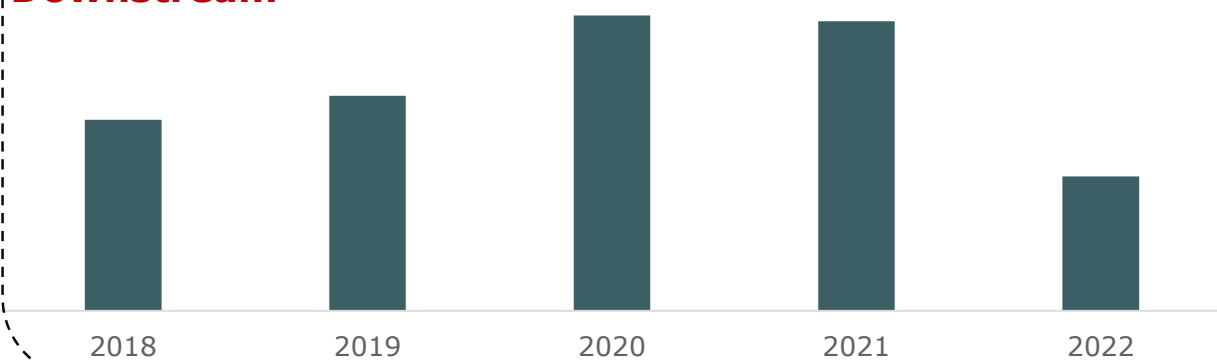


Historical Supply of Refined Zinc in China
2018-2022 (kt)

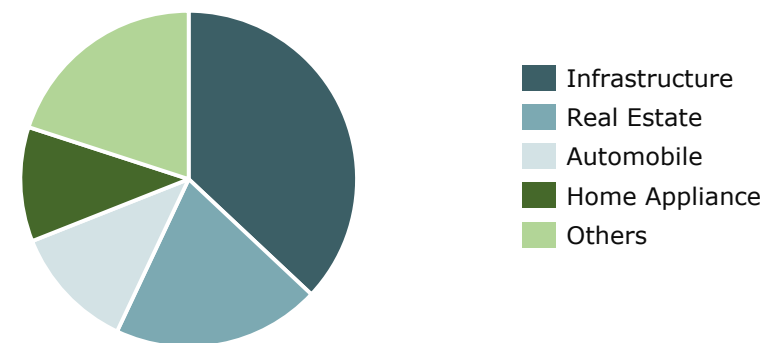


Downstream

China Domestic Zinc Consumption 2018-2022 (kt)



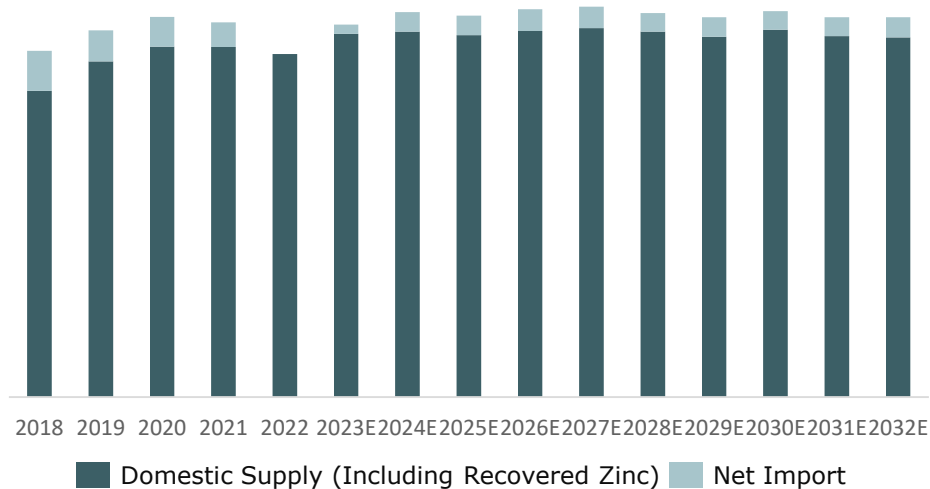
Major End-Users of Zinc in China



China Domestic Zinc Element Supply and Demand Forecast

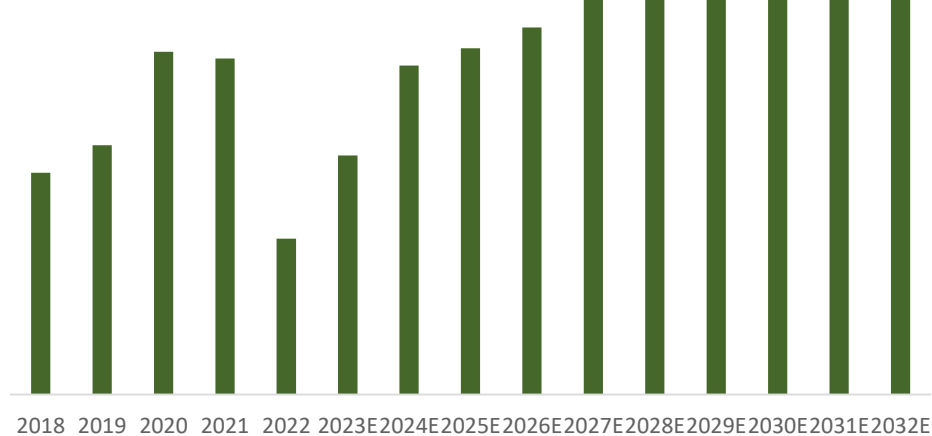
Supply

Unit: kilo ton



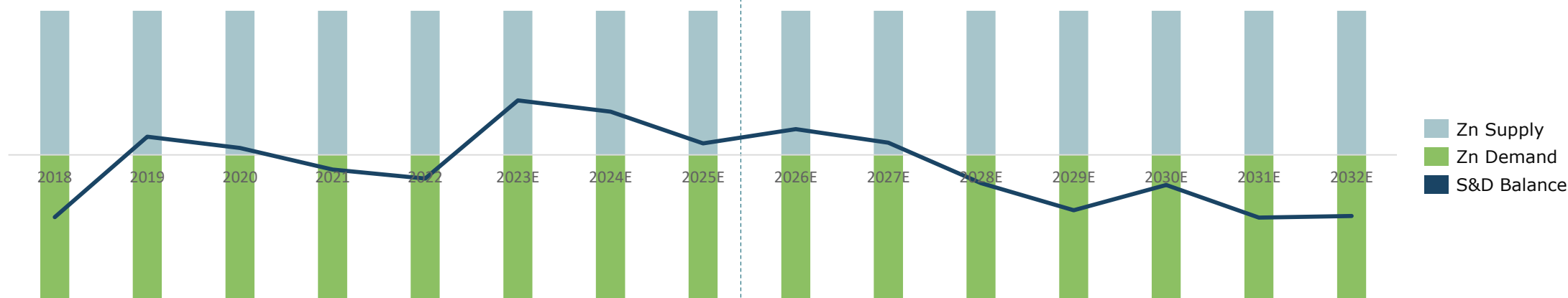
Demand

Unit: kilo ton



S & D

Unit: kilo ton

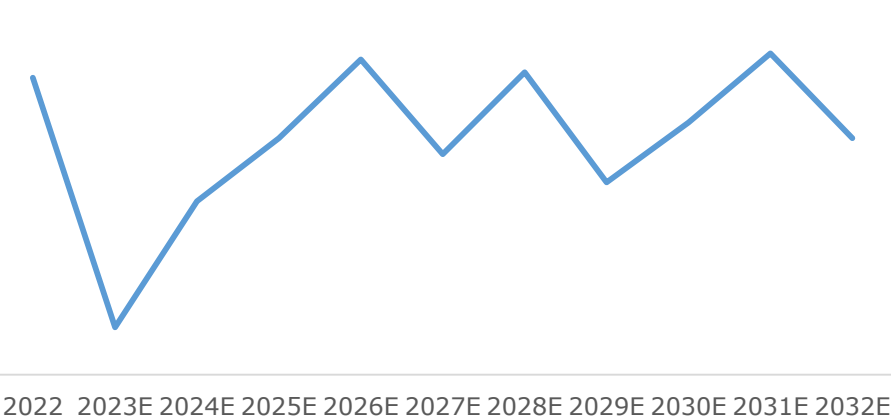


Source: SMM

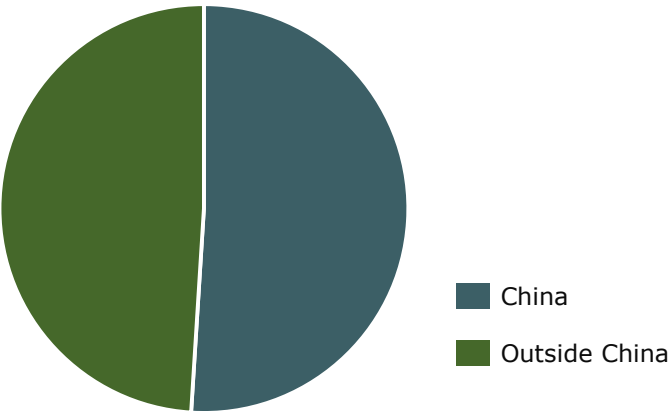


Advice on Future Zinc Industry Investment

Global Refined Zinc Price Forecast 2022-2032E (USD/t)



Distribution of Global Zinc Refinery Capabilities



Assessment for Zinc Industry Investment from Different Aspects

Strategic Value	Market Value	Business Demand	Client Capability	Resource Matching
*** (in Stars)	***	***	***	***

Recommended Business in Zinc Value Chain

Exploitation	Smelting	Material	Further Processing	Recycling	Dependent on Imported Resources	International Logistics	International Trade
* (Y/N)	*	*	*	*	*	*	*

Source: SMM