



# Zinc Recovery Industry Study

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## OBJECTIVES

- The client is a mining company engaged in the processing, extracting, and prospecting and trading of zinc, lead, germanium, and sulphuric acid products. Due to the lowering grade of zinc ore, zinc recovery is gaining more and more attention in China. The client thus planned to start their zinc recovery business. Before the initial investment, they would like to know in depth about the entire value chain of the industry.

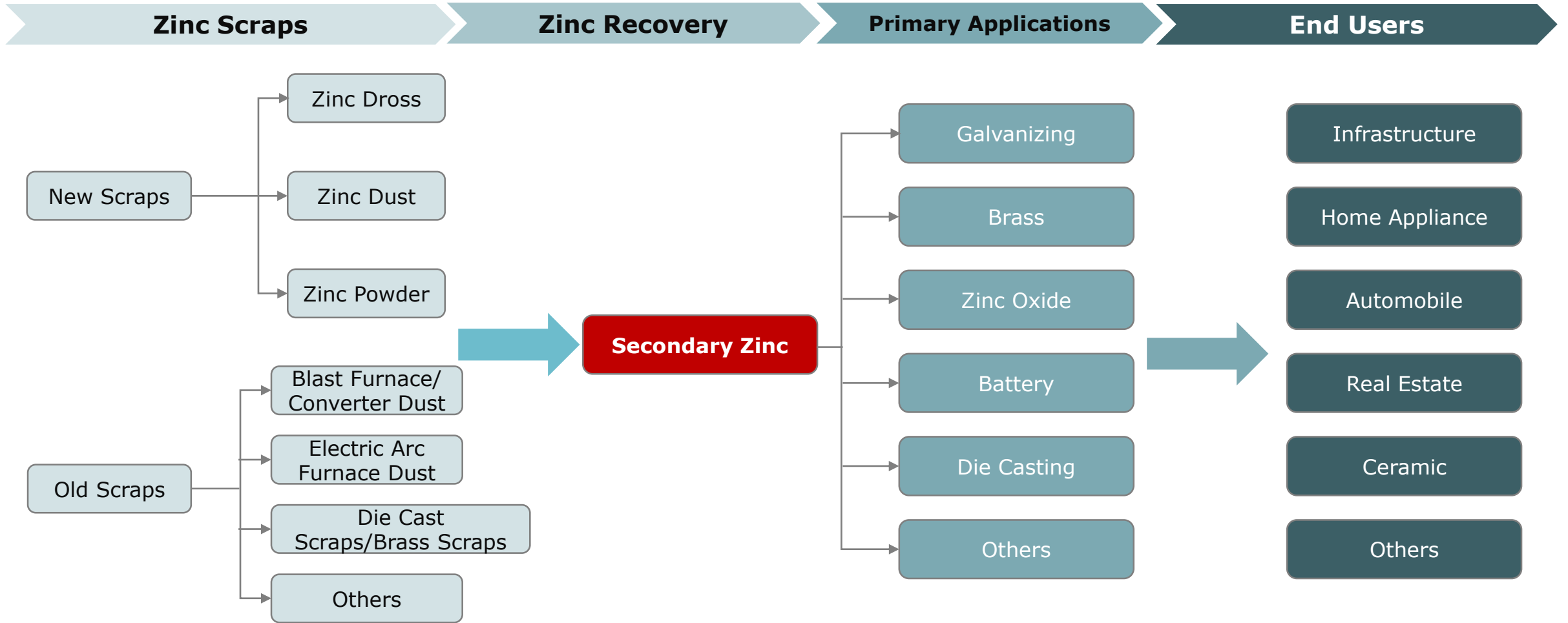
## PROCESS

- Methodology
  - ▶ S&D study of secondary zinc market in China
  - ▶ PEST analysis for zinc recovery market
  - ▶ Competitive analysis for zinc recovery industry in China via interview and desk research
  - ▶ In-depth research of raw material supply for zinc recovery
  - ▶ SWOT analysis of entering zinc recovery market
- Sample Size
  - ▶ Competitors (3), Crude Zinc Oxide & Zinc Calcine Producers (30), Recovered Zinc Producers (16), Other organizations, e.g. Industry Associations (5)
- Project Time
  - ▶ 6 weeks

## DELIVERABLES

- Supply and demand balance of secondary zinc, 2020-2025E
- Major recovery technologies and future advancing direction
- Distribution of raw material supply for zinc recovery in China
- Detailed information of top competitors in the industry
- Advice on market entry
  - ▶ Region
  - ▶ Capacity
  - ▶ Technology
  - ▶ Product Matrix

# Zinc Recovery Industry Value Chain

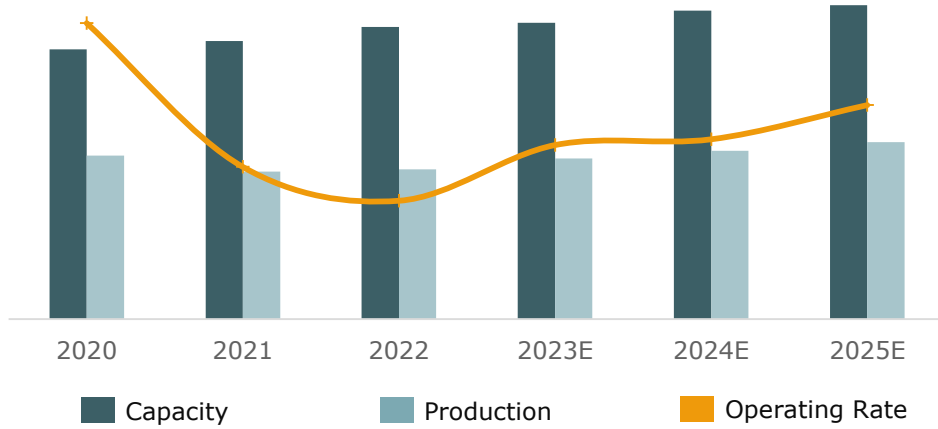


# Secondary Zinc Supply in China

## Secondary Zinc Supply and Forecast in China

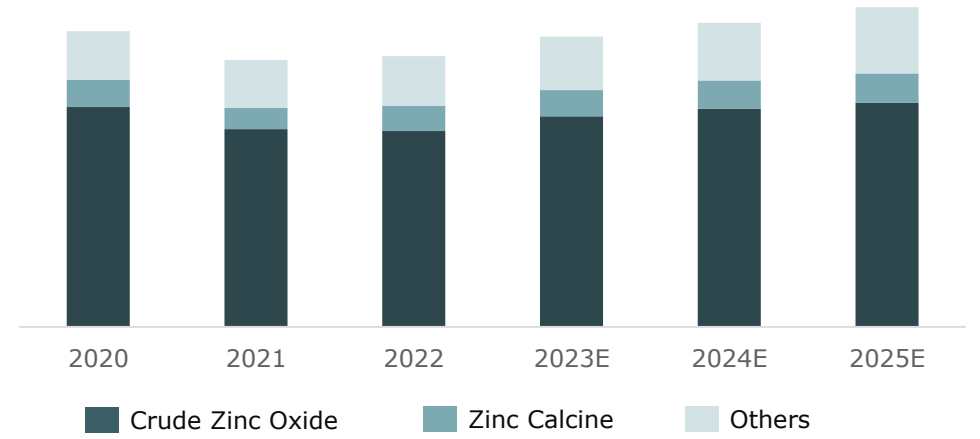
**Capacity and Production of Secondary Zinc in China (2020-2025E)**

Unit: kt



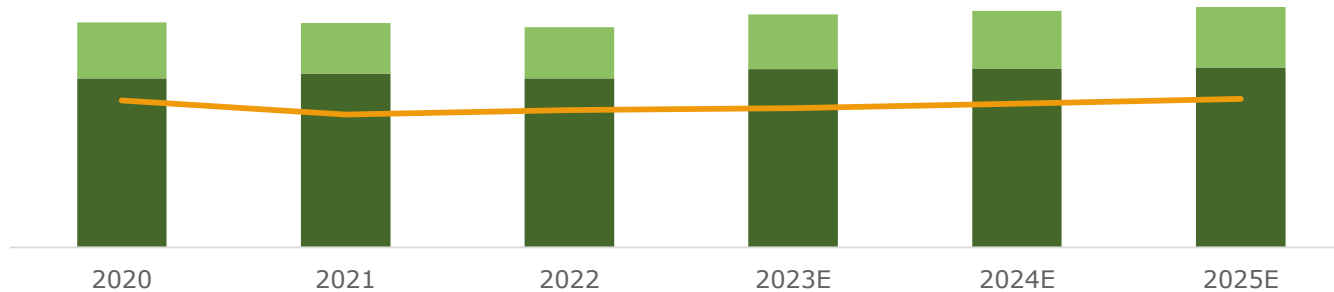
**Production of Secondary Zinc in China by Raw Material (2020-2025E)**

Unit: kt



**Production of Primary and Secondary Zinc in China (2020-2025E)**

Unit: kt

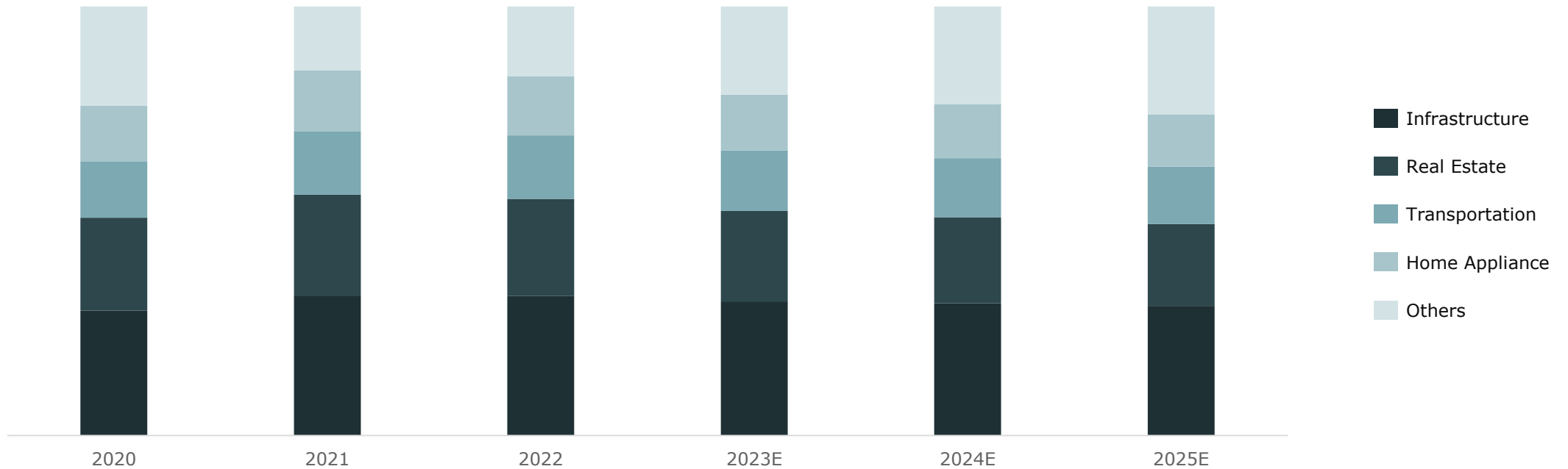


- Primary Zinc
- Secondary Zinc
- Proportion of Secondary Zinc

# Secondary Zinc Demand in China

## Secondary Zinc Demand and Forecast by End-User in China

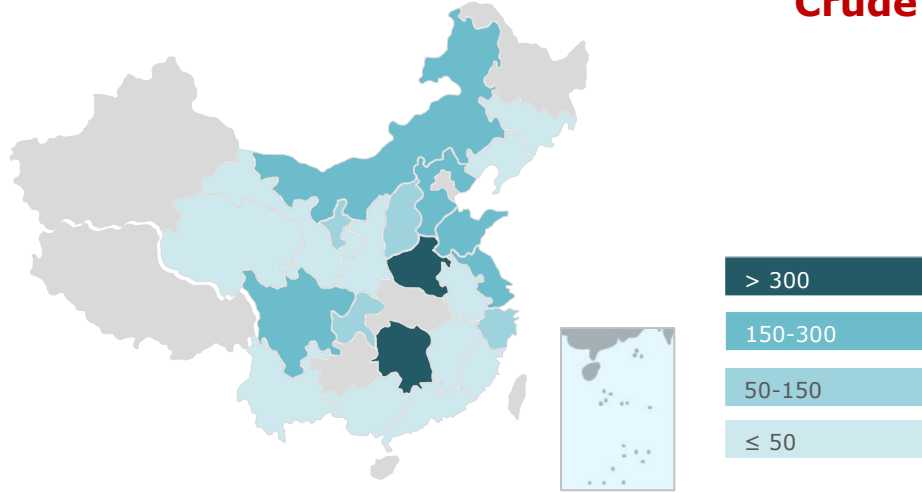
Unit: kt



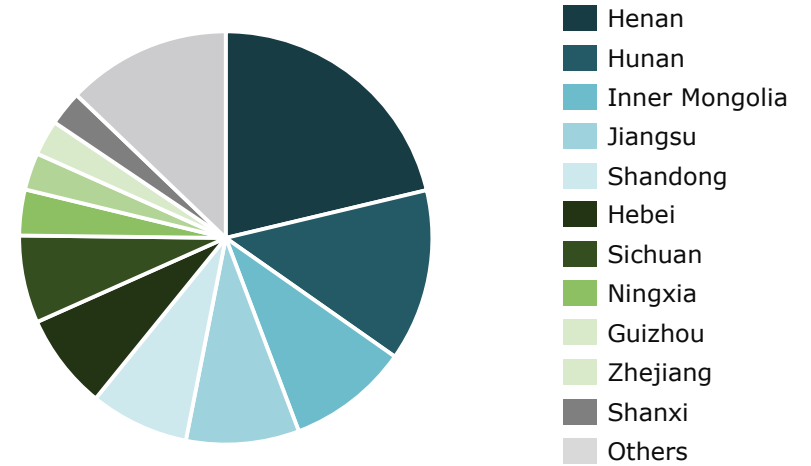
Source: SMM

# Secondary Zinc Raw Material Analysis

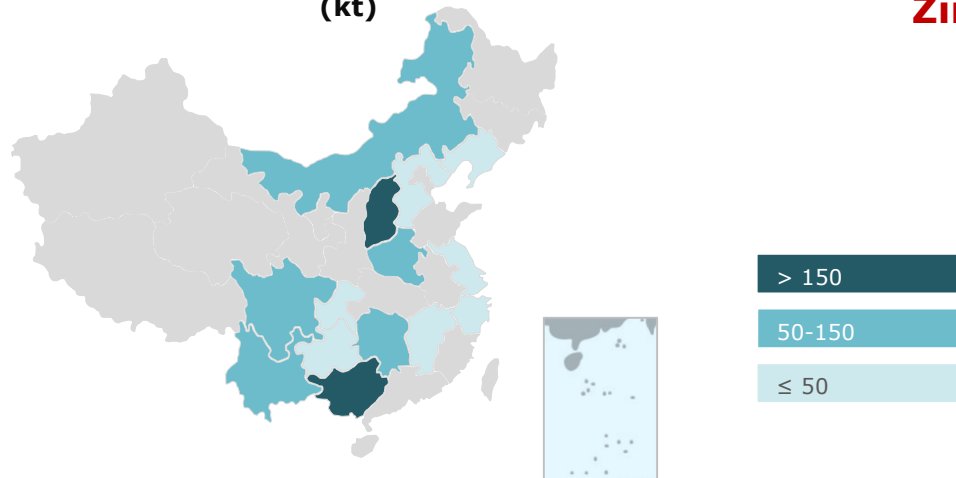
Distribution of Crude Zinc Oxide Production Capability (kt)



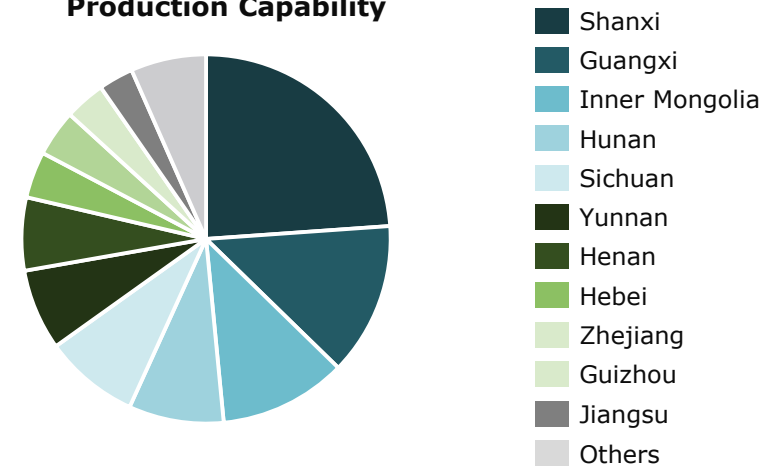
Provincial Proportion of Crude Zinc Oxide Production Capability



Distribution of Zinc Calcine Production Capability (kt)



Provincial Proportion of Zinc Calcine Production Capability



# SWOT Analysis of Starting Zinc Recovery Business

## Strengths (S)

- 1-Abundant Resources Being a State-Owned Company
- 2-Transferrable Technologies from Primary Zinc Production
- 3-Existing Customers from Primary Zinc Sales
- 4-Experience from Recovery Business for Other Metals

## Weaknesses (W)

- 1-No Existing Plants Producing Raw Material for Secondary Zinc;
- 2-Relatively Limited Technology Accumulation for Zinc Recovery

## Opportunities (O)

- 1-Gap between Current Secondary Zinc Production and the Relevant National Goal, Large Growth Space
- 2-No Plans for Other Primary Zinc Producer to Enter Zinc Recovery Industry
- 3-Possibility to Become First-Mover in Secondary Zinc Export

## Threats (T)

- 1-Competitions already Existed in the Industry
- 2-Growing Number of New Players in the Industry