

中国再生有色金属产业介绍

A Review of Chinese Base Metal Recycling Activities

中国有色金属工业协会再生金属分会副会长 刘巍

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主要内容

01 产业现状

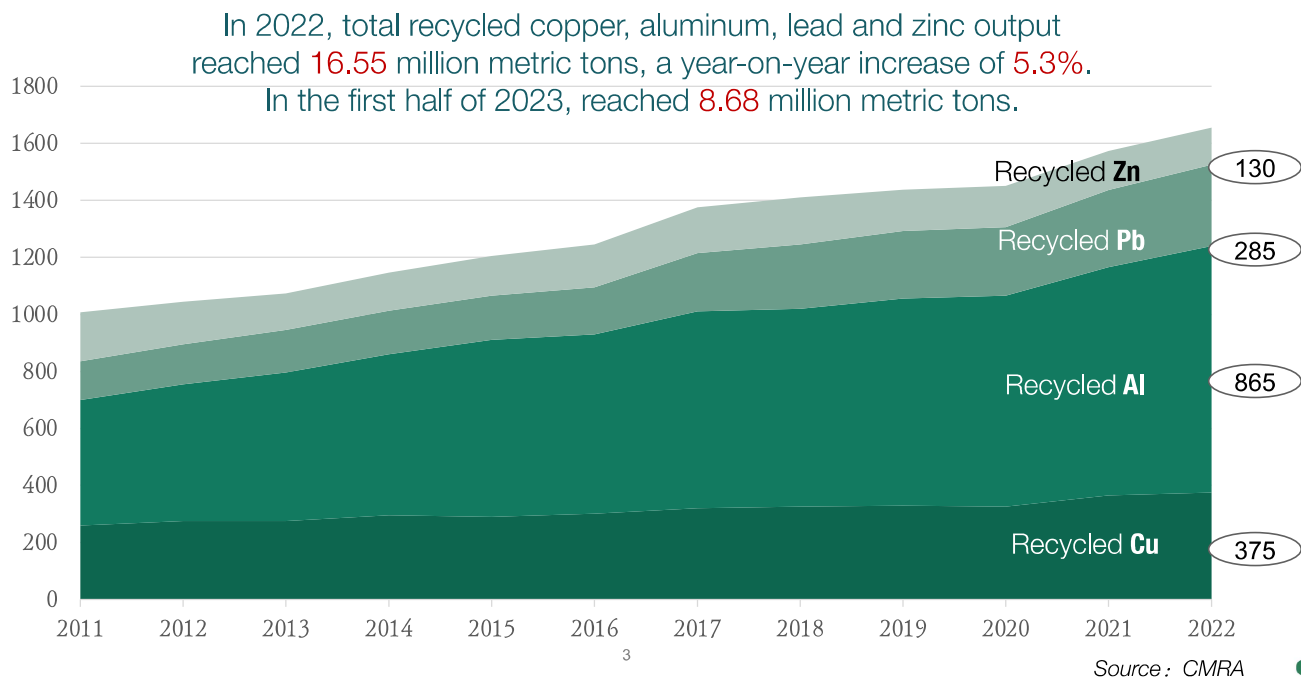
Current Status

02 热点分析

Hot Topics

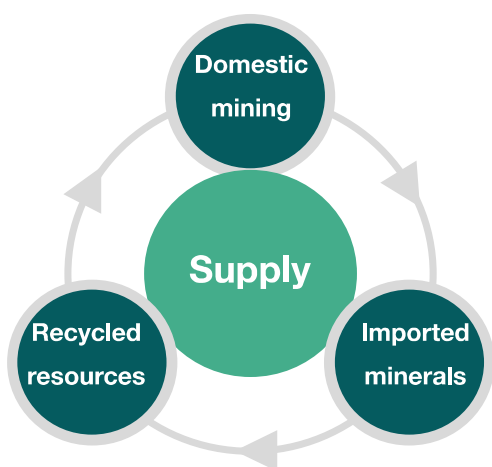


Industry scale continues to expand

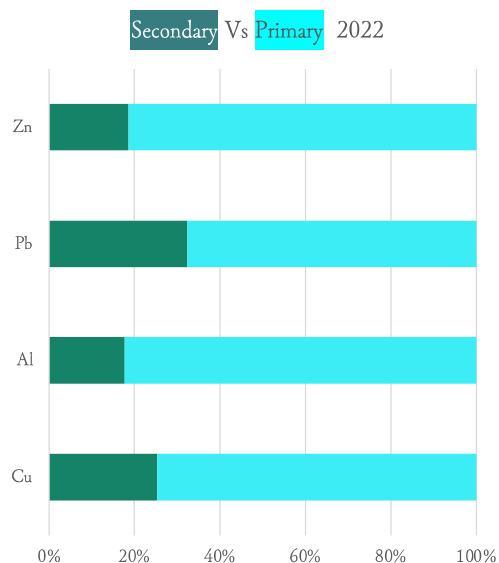


Increasingly important role

Resource Security Pattern



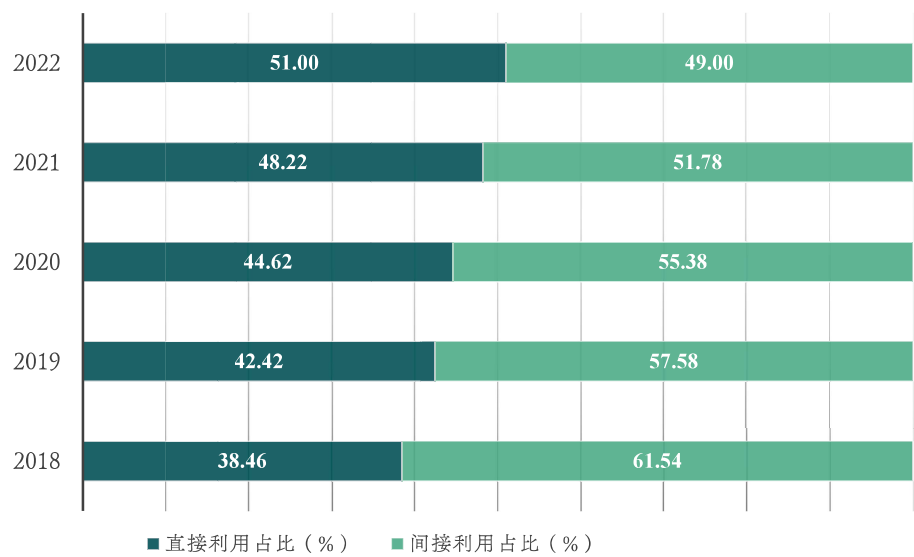
Production Output



Source: CMRA

Share of direct-use for Copper

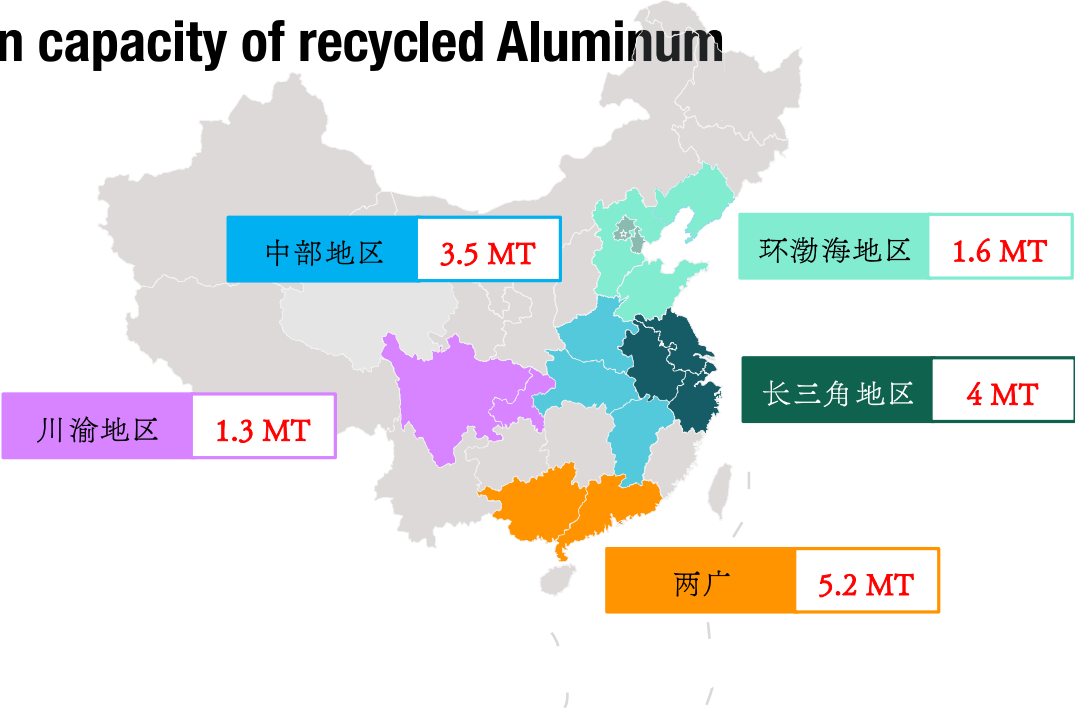
For copper, the output of direct-use reached 1.912 million metric tons in 2022, up 8.66% year-on-year. This accounted for 51% of China's total recycled copper output.



Source: CMRA



Production capacity of recycled Aluminum

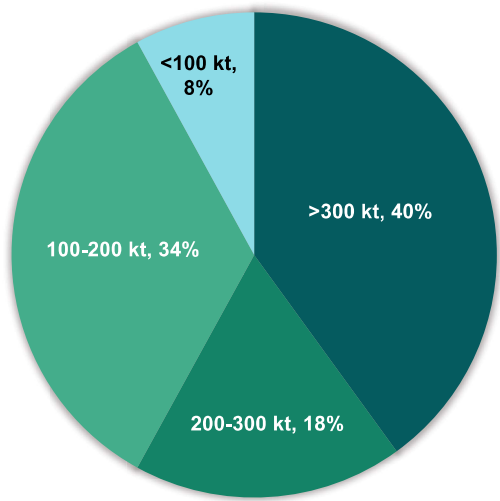


Source: CMRA

Integration of lead battery production and recycling

By the end of 2022,
67 qualified companies,
Distributed across 21
provinces/municipalities nationwide,
Total licensed processing capacity
reached 12.45 million metric tons.

PROCESSING CAPACITY 2022

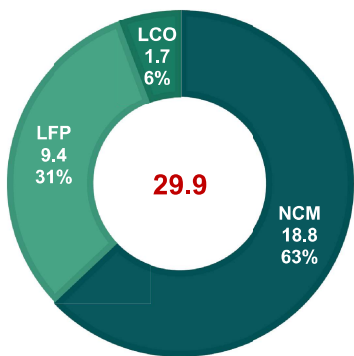


Source : CMRA

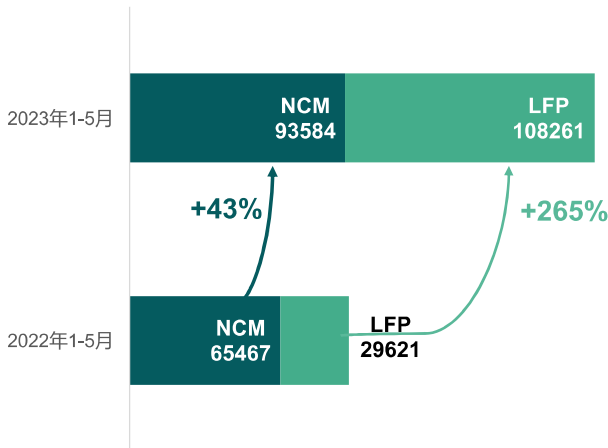
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Recycling of electric vehicle battery

2022 domestic recycling volumes
(10kt, share%)



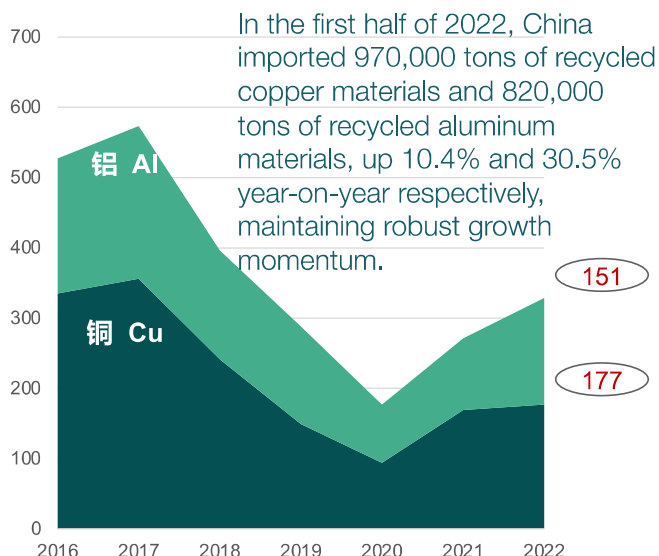
Rapid growth in 2023
(t, Y-on-Y)



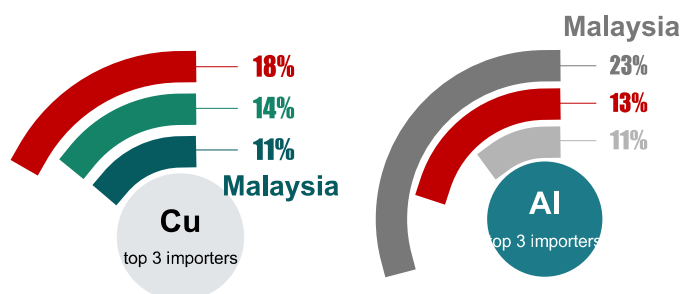
Source : SMM

Strong demand for imported recycled copper and aluminum

Imports rebounding with significantly improved quality



Southeast Asia matters



Last year, recycled copper and aluminum materials from Southeast Asia accounted for 23% and 31% of China's total imports respectively, mainly from Malaysia and Thailand.

Source: China Custom CMRA



Domestic scrap still accounts for the majority

China's accumulated nonferrous metal consumption exceeds 700 million tons, with scrap generation increasing rapidly year-on-year. Annual scrap nonferrous metal generation is projected at around 15 million tons during 2021-2025.

Linyi

4 MT metal scrap

Changge

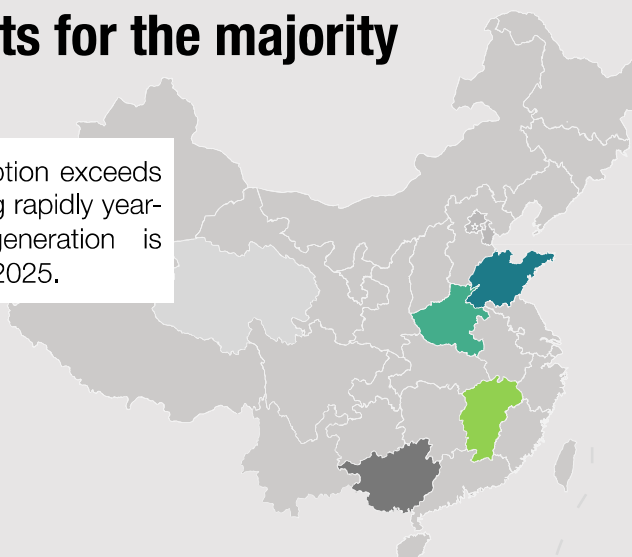
2.2 MT metal scrap

Yingtian

1.2 MT copper scrap

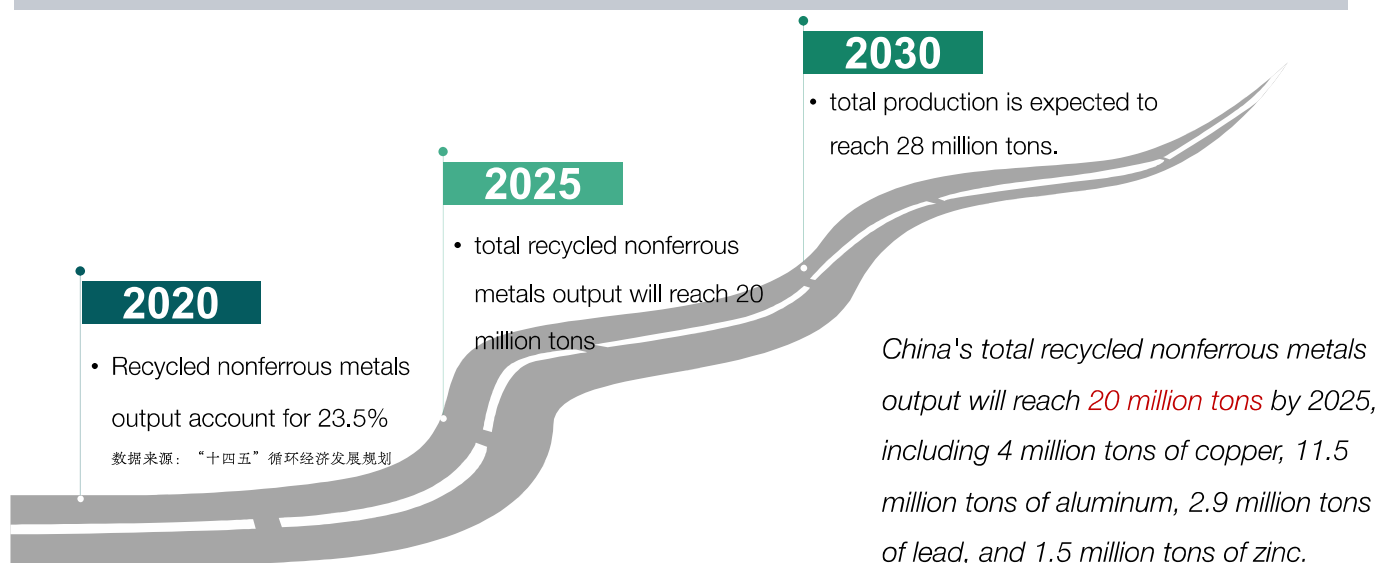
Wuzhou

1.8 MT metal scrap



Source: CMRA

Outlook remains optimistic



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Source: Wind MOC



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Better scrap preprocessing

01

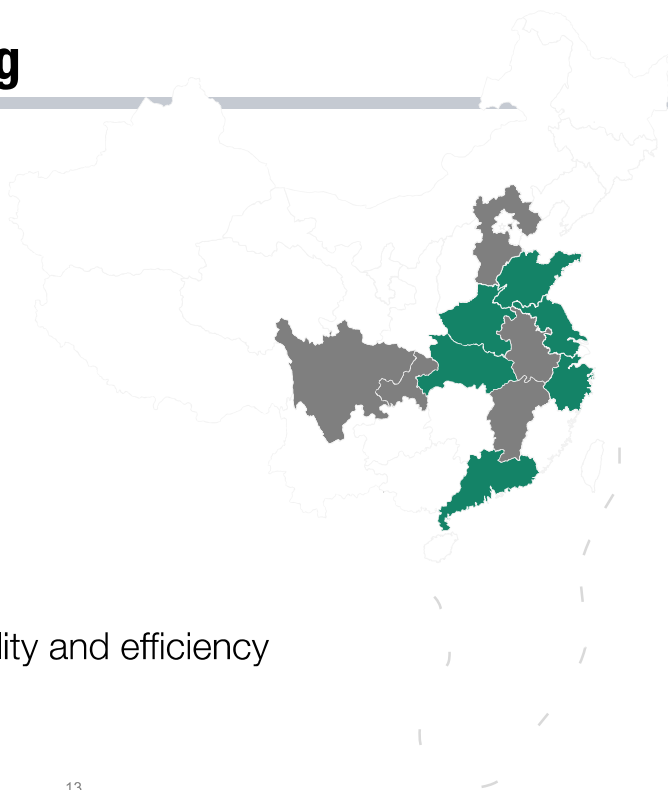
Enterprises demand not just scrap volumes, but quality and specifications.

02

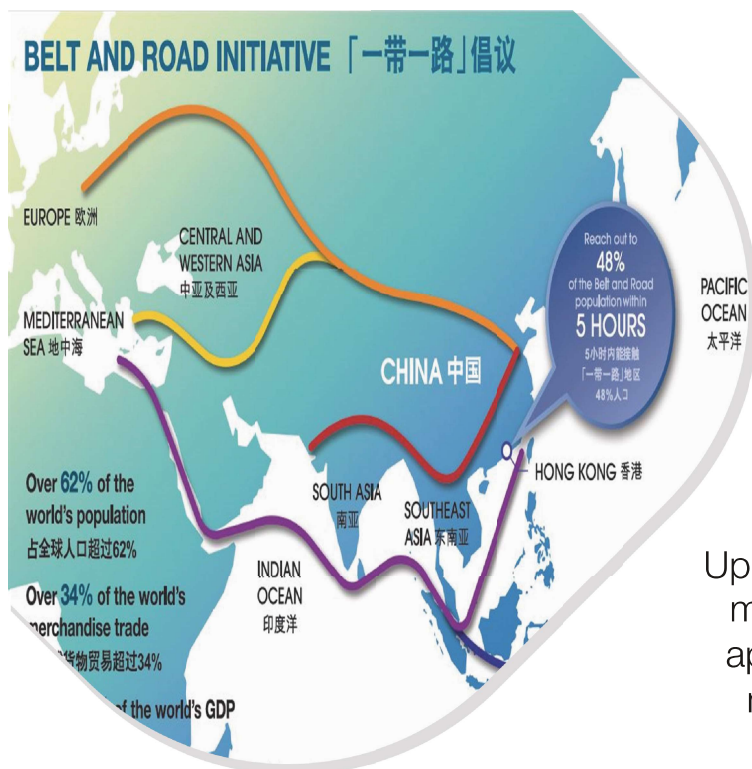
Preprocessing like shredding and sorting getting more attention

03

Goal is to improve scrap quality and efficiency



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Import regulations evolving Outbound investment increasing



Updated standards may allow wider approved import material types



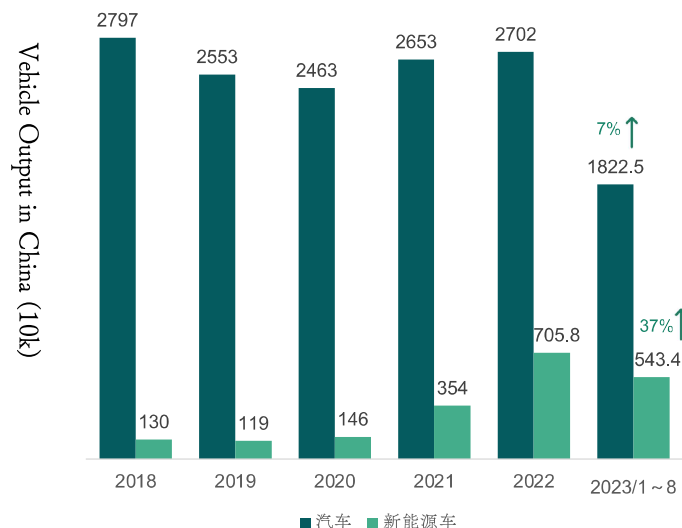
Chinese firms increasingly investing in overseas recycling projects

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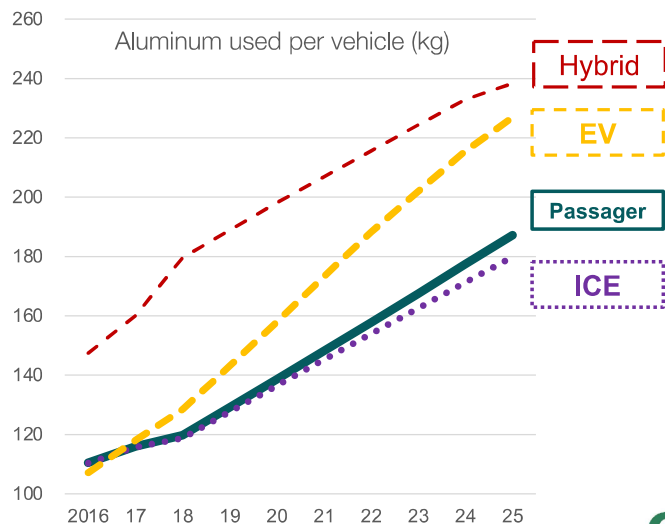
Automotive & Recycled aluminum

EV penetration rising quickly

EVs use 1.7 million tons aluminum by 2025



Source: Wind



Source: IAI



Digitalization for the ecosystem

交易线上数字化平台赋能再生金属行业

“互联网+再生金属贸易” 传统产业新机遇 Internet + Recycle



By connecting upstream supply chains, linking downstream demand, and creating closed-loop transactions, digital platforms integrate online and offline trade. All firms across the industry chain can then access tax, customs, transaction, logistics and financing services, enabling transparent trading credit and real-time government oversight.



Compete for the future



Specialization

Find your niche and
build deep
competitive moats



Profession

Enhance
professional
operations
expertise



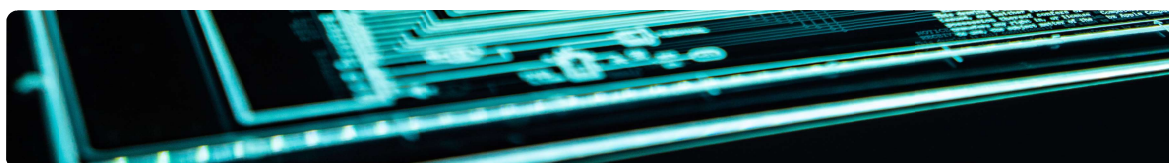
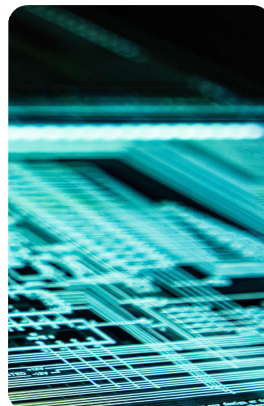
Speed

Rapidly adjust
strategies and
iterate for
continuous
improvement



Innovation

Apply new thinking
to analyze the
industry and
leverage creative
new models



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Thanks

Welcome to CMRA Convention

Oct 7-9th, 2023

Foshan China

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