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Titanium resources are abundant and titanium concentrate is priced domestically.

1. Titanium resources are abundant and my country leads the world in ilmenite resources.

my country's ilmenite reserves are high and of low grade. Titanium reserves are very abundant on the earth. According to data released by the United States Geological Survey (USGS) in 2021, the total global resources of anatase, ilmenite and rutile exceed 2 billion tons, of which TiO₂ of anatase and rutile The content is higher and the ilmenite content is less. The top three countries in terms of ilmenite reserves in the world are China, Australia, and India, with reserves of 2.3, 1.5, and 85 million tons respectively; the top three countries in rutile reserves are Australia, India, and the Republic of South Africa, with reserves of 92,700, 740, and 680 million tons respectively. Thousands of tons. Primary titanium (magnetic) iron ore accounts for 92% of my country's titanium ore, mainly concentrated in Sichuan (89%), Hubei (3%), and Shandong (3%); followed by ilmenite placer, accounting for 7%; rutile The smallest proportion is only 1%. The average grade of Chinese ilmenite is generally 5% to 10%, which is generally lower than that of foreign countries. The grade of Russian ilmenite is generally 5% to 15%, the average grade of titanium-containing vanadium titanium magnetite in Canada's Urbin titanium deposit is 10%, and the grade of Sanford Lake titanium magnetite in the United States is 9.5% to 30%. %.

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表 1: 全球钛铁矿储量主要分布在中国、澳大利亚

国家	钛铁矿 (吨)	金红石 (吨)
中国	230,000,000	—
澳大利亚	150,000,000	927,000
印度	85,000,000	7,400
巴西	43,000,000	—
挪威	37,000,000	—
南非	35,000,000	6,800
加拿大	31,000,000	—
莫桑比克	26,000,000	890
其他国家	26,000,000	400
马达加斯加	23,000,000	—
乌克兰	5,900,000	2,500
美国	2,000,000	—
越南	1,600,000	—
肯尼亚	440,000	170
塞拉利昂	—	490

数据来源: USGS, 国泰君安证券研究

Most mineral processing plants in the Panxi region of my country use the "two-stage strong magnetic + flotation" process to produce titanium concentrate. Domestic titanium concentrates are mainly supplied by vanadium-titanium magnetite mining and dressing enterprises in the Panxi area. The vanadium-ilmenite ores are first magnetically separated from iron ore, and the tailings obtained are used as raw materials for titanium dressing, and are divided into coarse and coarse titanium concentrates using a sloping plate thickener. For the coarse-grained grade, the process of iron removal - strong magnetic roughing - screening - grinding and iron removal - strong magnetic separation - strong magnetic sweeping - flotation is used for the coarse-grained grade; for the fine-grained grade, iron removal is used -The process of strong magnetic roughing-intense magnetic sweeping-iron removal-intense magnetic concentrating-strong magnetic sweeping-flotation, finally obtains titanium concentrate. The titanium concentrate in the Panxi area contains high levels of impurities such as calcium, magnesium, and silicon, which will increase the consumption of chlorine during the chlorination process and produce a large amount of waste salt and mud. Therefore, it needs further upgrading to become titanium for boiling chlorination. Raw material requirements.

Ore processing technology continues to improve, and the recovery rate is expected to be further improved. According to the stock prospectus of Anning Co., Ltd., after years of continuous investment in technology research and development, the company has greatly increased the recovery rate of titanium metal from vanadium titanium magnetite. From 2007 to 2019, the company's titanium-iron ratio increased from 10% to 36%. According to "Exploration of Increasing the Recovery Rate of Illuminum Concentrate in Panzhihua Titanium Concentration Plant" and "Current Status and Transformation and Upgrading Strategies of Mining and Concentration Production Technology of Vanadium Titanium Magnetite in Panzhihua", the recovery rate of titanium concentrate in Panzhihua Titanium Concentrator Plant has increased from 20% to 20% at the end of the 20th century. % has increased to the current 30%-45%, of which the recovery rate of large and medium-sized processing plants is 35%-45%, and the recovery rate of small and medium-sized processing plants is 28%-38%. It is expected that with the merger of small-scale processing plants, the comprehensive utilization rate of industry resources will be further improved and costs will be further reduced.

The price of domestic titanium concentrate mainly refers to Sichuan Panzhihua and Yunnan regions, and the price of imported titanium concentrate mainly refers to the price of mines in Australia and Mozambique. According to Baichuan Yingfu, the main quotation sources of domestic titanium concentrates are Panzhihua Iron and Steel, Anning Iron and Titanium, Yunnan, Hainan Ao Mine, etc.; the main reference of imported titanium concentrates are from Australia, Kenya, Mozambique, etc.

表 4: 钛精矿价格主要参考四川、云南地区报价

地区	指标	品位	备注
攀枝花		≥38%-42%	
攀枝花		≥46%	
四川攀钢		≥47%	
安宁铁钛		≥47%	
云南		≥45%	
海南澳矿		≥50%	国内价格
广西越南矿	TiO ₂	≥57%	
广西越南矿		≥46%	
广东莫桑比克矿		≥46%	
山东莫桑比克矿		≥46%	
澳大利亚		≥50%	
肯尼亚		≥47-49%	进口价格
莫桑比克		≥54%	

Taxes and fees: Titanium concentrate involves taxes and fees such as resource tax and value-added tax. According to the "Resource Tax Law of the People's Republic of China", iron, manganese, chromium, vanadium and titanium are ferrous metals, and the tax rate for their raw ore or mineral processing is 1%-9%. For Sichuan, according to the "Sichuan Provincial People's Government's Comprehensive Implementation of Resource Tax Reform According to the provisions of the "Notice", resource tax is levied on the ex-factory sales of vanadium-ilmenite concentrate without tax, and the tax rate is 4%. According to the notice of the Ministry of Finance and the State Administration of Taxation on the Value-Added Tax Rate for Metal Mineral and Non-metallic Mineral Mining and Processing Products, the value-added tax rate for metal mineral mining and processing products has been restored from 13% to 17%.

2. Titanium concentrate price: Enterprises in Panxi area have pricing power

my country's titanium concentrates are mainly concentrated in the Panxi area, and the output is increasing year by year. According to the China Titanium Industry Development Report, my country's titanium concentrate ore output in 2021 was 6.647 million tons, equivalent to 2.857 million tons of TiO₂, a year-on-year increase of 5.0%. Among them, the ore output in the Panxi region was 5.3 million tons, equivalent to 2.491 million tons of TiO₂. A year-on-year increase of 3.7%. The Panxi region's titanium concentrate production accounts for the highest proportion of titanium concentrate in the country: in 2016, the proportion was 61.8%, rising to 87.2% in 2021. Other regions in my country that produce titanium concentrate include Shandong, Yunnan, Hebei, etc.

The circulation volume of ilmenite concentrate is small, and the Panxi region has a greater influence on the price of ilmenite concentrate. At present, domestic titanium concentrates are mainly supplied by companies in the Panxi area, including Panzhihua Iron and Steel Mining, Lomon Mining and Metallurgy, Chongqing Xichang Mining, Anning Co., Ltd., Kunyuan/Liyu, Xingzhong Mining, Xingding Titanium Industry, etc. Among the leading domestic suppliers, Chongqing Iron and Steel Xichang and Anning Co., Ltd. sell titanium concentrate to external parties, while the rest are small mining companies with small circulation of titanium concentrate. According to Anning's announcement, the sales price of its titanium concentrate is mainly based on factors such as market supply and demand and current surrounding market prices. Large manufacturers in the Panxi area control the circulation of titanium concentrate in the market through the raw ore resources they control, and indirectly control the price in the Panxi area. After prices in the Panxi region increased, some downstream companies turned to titanium concentrates from other regions, pushing up prices in other regions. Among the leading titanium concentrate companies, the products of Panzhihua Iron and Steel Mining and Longbai Mining and Metallurgy are mainly for self-use, and Anning Co., Ltd. ranks first in the country in terms of market sales.



图 13 近三年国内钛精矿价格在 2000 元/吨上下波动



数据来源: wind, 国泰君安证券研究

The supply and demand of titanium dioxide is an important factor affecting the price of titanium concentrate. The price of titanium concentrate is affected by domestic and foreign supply and the demand for titanium sponge and titanium dioxide. Among them, as the main downstream of titanium concentrate, the price of titanium dioxide has an important impact on the price of titanium concentrate. When titanium dioxide is in the off-season, the market demand for titanium ore is weak, and small and medium-sized miners offer sales at a profit; when titanium dioxide is in the peak season, domestic demand is strong and the price of titanium concentrate rises.

Reference report



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钛资源储量丰富，钛精矿国内定价。

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海量文库支持，行业

1. 钛资源储量丰富，我国钛铁矿资源全球领先

我国钛铁矿的储量高、品位低。钛在地球上的储量十分丰富，根据美国地质调查局（USGS）2021 年公布的数据，全球锐钛矿、钛铁矿和金红石的资源总量超过 20 亿吨，其中锐钛矿和金红石的 TiO₂ 含量较高，钛铁矿含量较少。全球钛铁矿储量前三名的国家为中国、澳大利亚、印度，储量分别为 2.3、1.5、0.85 亿吨；金红石储量前三名分别为澳大利亚、印度、南非共和国，储量分别为 92700、740、680 万吨。我国钛矿中原生钛（磁）铁矿占比 92%，主要集中在四川（89%）、湖北（3%）、山东（3%）地区；其次是钛铁砂矿，占比 7%；金红石占比最少，只有 1%。中国钛铁矿平均品位一般为 5%~10%，与国外相比品位普遍偏低。俄罗斯钛铁矿的品位一般在 5%~15%，加拿大乌尔宾钛矿床含钛的钒钛磁铁矿的平均品位 10%，美国散弗德湖钛磁铁矿的品位在 9.5%~30%。

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表 1：全球钛铁矿储量主要分布在中国、澳大利亚

国家	钛铁矿（吨）	金红石（吨）
中国	230,000,000	—
澳大利亚	150,000,000	927,000
印度	85,000,000	7,400
巴西	43,000,000	—
挪威	37,000,000	—
南非	35,000,000	6,800
加拿大	31,000,000	—
莫桑比克	26,000,000	890
其他国家	26,000,000	400
马达加斯加	23,000,000	—
乌克兰	5,900,000	2,500
美国	2,000,000	—
越南	1,600,000	—
肯尼亚	440,000	170
塞拉利昂	—	490

数据来源：USGS，国泰君安证券研究

我国攀西地区多数选矿厂采用“两段强磁+浮选”流程生产钛精矿。国内钛精矿主要由攀西地区的钒钛磁铁矿采选企业供应，钒钛铁矿首先经过磁选出铁精矿，得到的尾矿作为选钛原料，使用斜板浓密机分为粗粒级和细粒级，对于粗粒级进行除铁-强磁粗选-筛分-磨矿除铁-强磁精选-强磁扫选-浮选的流程；对于细粒级采用除铁-强磁粗选-强磁扫选-除铁-强磁精选-强磁扫选-浮选的流程，最终得到钛精矿。攀西地区的钛精矿含钙、镁、硅等杂质的含量高，会增大氯化过程中氯气的消耗、产生大量废盐和泥浆，因此需要经过进一步提质才能成为沸腾氯化用钛原料的要求。

选矿技术不断进步，回收率有望进一步提高。根据安宁股份股票招股书，公司经过多年持续技术研发投入，大幅提高了钒钛磁铁矿的钛金属的回收率，从2007年到2019年，公司的钛铁比从10%提升到36%。根据《攀枝花选钛厂提高钛精矿回收率的探索》和《攀西钒钛磁铁矿采选生产技术现状与转型升级策略》，攀枝花选钛厂的钛精矿回收率从20世纪末的20%提升到现在的30%-45%，其中大中型选厂的回收率为35%-45%，中小型选厂回收率28%-38%。预期随着小规模选厂的兼并，行业资源综合利用率将会进一步提升，成本进一步下降。

国内钛精矿价格主要参考四川攀枝花及云南地区，进口钛精矿价格主要参考澳洲、莫桑比克矿价格。根据百川盈孚，国内钛精矿的主要报价来源为攀枝花、四川攀钢、安宁铁钛、云南、海南澳矿等；进口的钛精矿主要参考价格有澳大利亚、肯尼亚、莫桑比克等的价格。

表 4：钛精矿价格主要参考四川、云南地区报价			
地区	指标	品位	备注
攀枝花	TiO ₂	≥38%-42%	国内价格
攀枝花		≥46%	
四川攀钢		≥47%	
安宁铁钛		≥47%	
云南		≥45%	
海南澳矿		≥50%	
广西越南矿		≥57%	
广西越南矿		≥46%	
广东莫桑比克矿		≥46%	
山东莫桑比克矿		≥46%	
澳大利亚		≥50%	进口价格
肯尼亚		≥47-49%	
莫桑比克		≥54%	

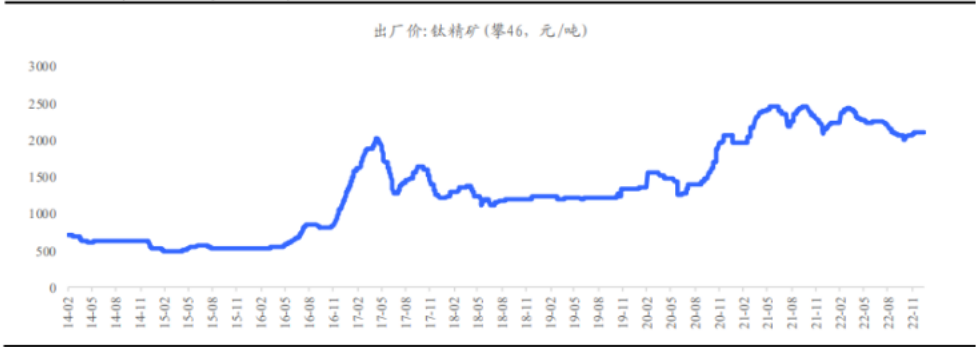
税费：钛精矿涉及资源税、增值税等税费。根据《中华人民共和国资源税法》，铁、锰、铬、钒钛属于黑色金属，其原矿或选矿的税率为1%-9%，对于四川地区，根据《四川省人民政府关于全面实施资源税改革的通知》的规定，资源税按钒钛铁精矿出厂不含税的销售额计征，税率为4%。根据财政部、国家税务总局《关于金属矿、非金属矿采选产品增值税税率》的通知，金属矿采选产品的增值税税率由13%恢复到17%。

2. 钛精矿价格：攀西地区企业掌握定价权

我国钛精矿主要集中在攀西地区，产量逐年增高。根据中国钛工业发展报告，2021年我国钛精矿矿石产量为664.7万吨，折合TiO2为285.7万吨，同比增长5.0%，其中攀西地区矿石产量为530万吨，折合TiO2为249.1万吨，同比增长3.7%。攀西地区钛精矿产量占全国钛精矿最高：2016年占比为61.8%，2021年上升至87.2%。我国其他生产钛精矿的地区有山东、云南、河北等。

钛精矿流通量较少，攀西地区对钛精矿价格的影响力较高。目前国内钛精矿主要由攀西地区企业供应，包括攀钢矿业、龙蟒矿冶、重钢西昌矿业、安宁股份、坤元/立宇、兴中矿业、兴鼎钛业等。国内龙头供应商中，重钢西昌、安宁股份对外销售钛精矿，其余均为小型矿企，钛精矿流通量较少。根据安宁股份的公告，其钛精矿的销售价格主要依据市场供需情况和当期周边市场价格等因素。攀西地区的大厂通过掌控的原矿资源控制市场上钛精矿的流通量，间接控制攀西地区的价格。攀西地区价格升高后，部分下游企业转而寻求其他地区的钛精矿，推升其他地区的价格。钛精矿龙头企业中，攀钢矿业、重钢西昌的产品主要为自用，安宁股份的对市场销售规模国内第一。

图 13 近三年国内钛精矿价格在 2000 元/吨上下波动



数据来源: wind, 国泰君安证券研究

钛白粉供需是钛精矿价格的重要影响因素。钛精矿价格受到国内外供给及海绵钛、钛白粉需求的共同影响。其中,作为钛精矿主要下游,钛白粉价格对钛精矿的价格有重要影响。当钛白粉处于淡季时,钛矿市场需求偏弱,中小矿商让利销售;当钛白粉处于旺季时,国内需求旺盛,钛精矿价格上涨。

参考报告



钛合金行业深度报告: 航空引领钛产业发展, 民用钛空间广阔.pdf

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