

《中国的稀土状况与政策》

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Situation and Policies of China's Rare Earth Industry
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前言

Preface

稀土是不可再生的重要自然资源，在经济社会发展中的用途日益广泛。

Rare earths are an important, non-renewable natural resource with increasingly wider applications in economic and social development.

中国是稀土资源较为丰富的国家之一。20世纪50年代以来，中国稀土行业取得了很大进步。经过多年努力，中国成为世界上最大的稀土生产、应用和出口国。

China is among the countries with relatively rich rare earth reserves. Since the 1950s, remarkable progress has been witnessed made in China's rare earth industry. After many years of effort, China has become the world's largest producer, consumer and exporter of rare earth products.

稀土开发在造福人类的同时，与之相伴的资源和环境问题不断凸显。在稀土开发利用中，资源的合理利用和环境的有效保护是世界面临的共同挑战。近年来，中国在稀土的开采、生产、出口等环节综合采取措施，加大资源和环境保护的力度，努力促进稀土行业持续健康发展。

While bringing benefits to mankind, the exploitation of rare earth has brought about increasingly significant problems regarding this resource and the environment. In the exploitation and utilization of rare earth, the rational utilization and effective protection of the environment pose common challenges for the world at large. In recent years, China has taken comprehensive measures in the links of mining, production and exporting of rare earth goods and strengthened efforts for the protection of the resource and the environment, endeavoring to ensure a sustainable and healthy development of this industry.

随着经济全球化的深入发展，中国在稀土领域的国际交流合作日益增多。中国一贯尊重规则，信守承诺，为世界提供了大量的稀土产品。中国将继续按照世界贸易组织规则，加强稀土行业的科学管理，向国际市场供应稀土产品，为世界经济发展和繁荣作出贡献。

With the in-depth development of economic globalization, China is involved in more extensive international exchanges and cooperation in the field of rare earth. Always honoring the rules and living up to its commitments, China has provided the world with large quantities of rare earth products. It will continue to follow the WTO rules, strengthen scientific management of this industry and supply rare earth products to the global market, so as to make its due contribution to the development and prosperity of the world economy.

一段时期以来，一些国家高度关注中国的稀土状况与政策，有着各种各样的说法。这里就此做一介绍，以增进国际社会的了解。

For some time now, some countries have been particularly fretful about the situation of China's rare earth industry and related policies, doing a lot of guesswork and conjuring up many stories. We hereby give a presentation about China's rare earth industry in order to further provide the international community with a better understanding of this issue.

一、稀土现状

I. Current Situation of China's Rare Earth Industry

稀土是元素周期表中镧系元素镧(La)、铈(Ce)、镨(Pr)、钕(Nd)、钷(Pm)、钐(Sm)、铕(Eu)、钆(Gd)、铽(Tb)、镝(Dy)、钬(Ho)、铒(Er)、铥(Tm)、镱(Yb)、镱(Lu)，加上与其同族的钪(Sc)和钇(Y)，共 17 种元素的总称。按元素原子量及物理化学性质，分为轻、中、重稀土元素，前 5 种元素为轻稀土，其余为中重稀土。稀土因其独特的物理化学性质，广泛应用于新能源、新材料、节能环保、航空航天、电子信息等领域，是现代工业中不可或缺的重要元素。

Rare earths are a group of 17 chemical elements in the periodic table of the elements, i.e., Lanthanum (La), Cerium (Ce), Praseodymium (Pr), Neodymium (Nd), Promethium (Pm), Samarium (Sm), Europium (Eu), Gadolinium (Gd), Terbium (Tb), Dysprosium (Dy), Holmium (Ho), Erbium (Er), Thulium (Tm), Ytterbium (Yb) and Lutecium (Lu), and their congeners Scandium (Sc) and Yttrium (Y). According to their atomic weights and physicochemical properties, they are divided into light, middle and heavy rare earth elements. The first five above-mentioned elements are light ones, and the rest are either middle or heavy ones. Because of their unique physicochemical properties, rare earth elements are considered indispensable in modern industry as they are extensively used in areas such as new energy, new materials, energy conservation and environmental protection, aeronautics and astronautics and electronic information, to name but a few.

中国拥有较为丰富的稀土资源，中国的稀土储量约占世界总储量的 23%。中国的稀土资源主要有以下特点：

China is relatively abundant in rare earth resources, and its rare earth reserves account for approximately 23 percent of the world's total. China's rare earth resources display the following characteristics:

——资源赋存分布“北轻南重”。轻稀土矿主要分布在内蒙古包头等北方地区和四川凉山，离子型中重稀土矿主要分布在江西赣州、福建龙岩等南方地区。

- Their distribution presents a "light north, heavy south" pattern. Light rare earth mines are mainly located in Baotou of the Inner Mongolia Autonomous Region, and other northern areas, as well as in Liangshan of Sichuan Province, while ion-absorbed-type middle and heavy rare earth deposits are mainly found in Ganzhou of Jiangxi Province, Longyan of Fujian Province, and some other southern areas.

——资源类型较多。稀土矿物种类丰富，包括氟碳铈矿、独居石矿、离子型矿、磷钇矿、褐钇铈矿等，稀土元素较全。离子型中重稀土矿在世界上占有重要地位。

- The types of rare earth resources are rather diversified. China has a rich variety of rare earth minerals, including bastnaesite, monazite, ion-absorption minerals, xenotime, fergusonite, and others, with a relatively complete range of rare earth elements. Among them, the ion-absorption middle and heavy rare earth deposits occupy an important position in the world.

——轻稀土矿伴生的放射性元素对环境的影响大。轻稀土矿大多可规模化工业性开采，但钍等放射性元素处理难度较大，在开采和冶炼分离过程中需重视对人类健康和生态环境的影响。

- The associated radioactive elements of light rare earth minerals pose major problems for the environment. Most of China's light rare earth deposits ores can be industrially mined, but thorium (Th) and other radioactive elements are difficult to treat, and therefore great attention must be paid to its impact on people's health and the ecology when they are mined, smelted and separated.

——离子型中重稀土矿赋存条件差。离子型稀土矿中稀土元素呈离子态吸附于土壤之中，分布散、丰度低，规模化工业性开采难度大。

- Ion-absorption middle and heavy rare earth ores have poor occurrence conditions. In ion-absorbed-type rare earth deposits, the rare earth elements are absorbed in the soil in the form of ions, making it difficult for industrial exploitation due to sparse distribution and low abundance rate.

20世纪70年代末实行改革开放以来，中国稀土工业迅速发展。稀土开采、冶炼和应用技术研发取得较大进步，产业规模不断扩大，基本满足了国民经济和社会发展的需要。

Since the introduction of the reform and opening-up policies in the late 1970s, China's rare earth industry has seen rapid development. Major progress has been made in the research and development of relevant mining, smelting and utilizing technologies, and the increasing expansion of the industrial scale has basically satisfied the needs of the nation's economic growth and social development.

——形成完整的工业体系。中国已形成内蒙古包头、四川凉山轻稀土和以江西赣州为代表的南方五省中重稀土三大生产基地，具有完整的采选、冶炼、分离技术以及装备制造、材料加工和应用工业体系，可以生产400多个品种、1000多个规格的稀土产品。2011年，中国稀土冶炼产品产量为9.69万吨，占世界总产量的90%以上。

- A complete industrial system has been achieved. China has developed three major rare earth production areas, i.e., the light rare earth production areas in Baotou of Inner Mongolia and Liangshan of Sichuan, and middle and heavy rare earth production areas in the five southern

provinces centering around Ganzhou of Jiangxi Province. With a complete industrial system armed with mining, dressing, smelting and separating technologies and incorporating equipment manufacturing, material processing and end-product utilization, China can produce over 400 varieties of rare earth products in more than 1, 000 specifications. In 2011, China produced 96, 900 tonnes of rare earth smelting separation products, accounting for more than 90 percent of the world's total output.

——市场环境逐步完善。中国不断推进稀土行业改革，推动形成投资主体多元、企业自主决策、价格供求决定的稀土市场体系。最近几年，中国稀土行业投资快速增长，市场规模不断扩大，国有、民营、外资等多种经济成分并存，稀土市场规模目前已接近千亿元人民币。市场秩序逐步改善，企业间的兼并重组逐步推进，稀土行业“小、散、乱”的局面得到了初步改观。

- The market environment is gradually improving as China is constantly expediting reform in the rare earth industry, promoting the development of a market system featuring diversified investment, independent decision-making by businesses and pricing according to supply and demand. In recent years, investment in China's rare earth industry has experienced rapid growth, the market has been constantly expanded, state-owned, privately owned and foreign-invested sectors coexist, and the value of the rare earth metal market is approaching 100 billion yuan. The market order in this sector is gradually improving, and progressive development is being made in the merger and reorganization of businesses. The old picture of a "small, scattered, and disorderly" rare earth industry has vanished.

——科技水平进一步提高。经过多年发展，中国建立起较为完整的研发体系，在稀土采选、冶炼、分离等领域开发了多项具有国际先进水平的技术，独有的采选工艺和先进的分离技术为稀土资源的开发利用奠定了坚实基础。稀土新材料产业得到稳步发展，实现了稀土永磁材料、发光材料、储氢材料、催化材料等新材料的产业化，为改造提升传统产业和发展战略性新兴产业提供了支持。

- Scientific and technological level has improved further. After many years of development, China has established a relatively complete R&D system, pioneered numerous technologies of international advanced levels in rare earth mining and dressing, smelting, separating, etc., and its unique mining and dressing processes and advanced separating techniques have laid a solid foundation for efficient exploitation and utilization of rare earth resources. The rare earth new materials industry has experienced steady development, and industrialization has been achieved in using rare earths to produce permanent-magnet, luminescent, hydrogen-storage, and catalytic materials, and other new materials, providing support for the restructuring and upgrading of traditional industries, and the development of emerging industries of strategic importance.

中国稀土行业的快速发展，不仅满足了国内经济社会发展的需要，而且为全球稀土供应作出了重要贡献。长期以来，中国认真履行加入世界贸易组织的承诺，遵守世界贸易组织规则，促进稀土的公平贸易。当前，中国以 23%的稀土资源承担了世界 90%以上的市场供应。中国生产的稀土永磁材料、发光材料、储氢材料、抛光材料等均占世界产量的 70%以上。

中国的稀土材料、器件以及节能灯、微特电机、镍氢电池等终端产品，满足了世界各国特别是发达国家高技术产业发展的需求。

The rapid development of China's rare earth industry has not only satisfied domestic demand for economic and social development, but also made important contributions to the world's rare earth supply. For many years, China has been faithfully fulfilling its pledges upon its accession to the WTO, honoring the WTO rules, and promoting fair trade in rare earths. Currently, China supplies over 90 percent of the global market rare earth needs with 23 percent of the world's total reserves, its output of permanent-magnet, luminescent, hydrogen-storage and polishing materials, which use rare earths as raw materials, accounts for more than 70 percent of the world's total, and China-produced rare earth materials, parts and components, as well as rare earth end products, such as energy-saving lamps, special and small electric motors and NiMH batteries, satisfied the development needs of high-tech industries of other countries, especially those of the developed countries.

在快速发展的同时，中国的稀土行业存在不少问题，中国也为此付出了巨大代价。主要表现在：

Despite its rapid development, China's rare earth industry also faces many problems, for which China has paid a big price. The following are some of the problems:

——资源过度开发。经过半个多世纪的超强度开采，中国稀土资源保有储量及保障年限不断下降，主要矿区资源加速衰减，原有矿山资源大多枯竭。包头稀土矿主要矿区资源仅剩三分之一，南方离子型稀土矿储采比已由 20 年前的 50 降至目前的 15。南方离子型稀土大多位于偏远山区，山高林密，矿区分散，矿点众多，监管成本高、难度大，非法开采使资源遭到了严重破坏。采富弃贫、采易弃难现象严重，资源回收率较低，南方离子型稀土资源开采回收率不到 50%，包头稀土矿采选利用率仅 10%。

- Excessive exploitation of rare earth resources. After more than 50 years of excessive mining, China's rare earth reserves have kept declining and the years of guaranteed rare earth supply have been reducing. The decline of rare earth resources in major mining areas is accelerating, as most of the original resources are depleted. In Baotou, only one-third of the original volume of rare earth resources is available in the main mining areas, and the reserve-extraction ratio of ion-absorption rare earth mines in China's southern provinces has declined from 50 two decades ago to the present 15. Most of the southern ion-absorption rare earth deposits are located in remote mountainous areas. There are so many mines scattering over a large area that it is difficult and costly to monitor their operation. As a result, illegal mining has severely depleted local resources, and mines rich in reserves and easy to exploit are favored over the others, resulting in a low recovery rate of the rare earth resources. Less than 50 percent of such resources are recovered in ion-absorption rare earth mines in southern China, and only ten percent of the Baotou reserves are dressed and utilized.

——生态环境破坏严重。稀土开采、选冶、分离存在的落后生产工艺和技术，严重破坏

地表植被，造成水土流失和土壤污染、酸化，使得农作物减产甚至绝收。离子型中重稀土矿过去采用落后的堆浸、池浸工艺，每生产 1 吨稀土氧化物产生约 2000 吨尾砂，目前虽已采用较为先进的原地浸矿工艺，但仍不可避免地产生大量的氨氮、重金属等污染物，破坏植被，严重污染地表水、地下水和农田。轻稀土矿多为多金属共伴生矿，在冶炼、分离过程中会产生大量有毒有害气体、高浓度氨氮废水、放射性废渣等污染物。一些地方因为稀土的过度开采，还造成山体滑坡、河道堵塞、突发性环境污染事件，甚至造成重大事故灾难，给公众的生命健康和生态环境带来重大损失。而生态环境的恢复与治理，也成为一些稀土产区的沉重负担。

- Severe damage to the ecological environment. Outdated production processes and techniques in the mining, dressing, smelting and separating of rare earth ores have severely damaged surface vegetation, caused soil erosion, pollution, and acidification, and reduced or even eliminated food crop output. In the past, the outmoded tank leaching and heap leaching techniques were employed at ion-absorption middle and heavy rare earth mines, creating 2,000 tonnes of tailings for the production of every tonne of REO (rare earth oxide). Although more advanced in-situ leaching method has been widely adopted, large quantities of ammonium nitrogen, heavy metal and other pollutants are being produced, resulting in the destruction of vegetation and severe pollution of surface water, ground water and farmland. Light rare earth mines usually contain many associated metals, and large quantities of toxic and hazardous gases, waste water with high concentration of ammonium nitrogen and radioactive residues are generated during the processes of smelting and separating. In some places, the excessive rare earth mining has resulted in landslides, clogged rivers, environmental pollution emergencies, and even major accidents and disasters, causing great damage to people's safety and health, and the ecological environment. At the same time, the restoration and improvement of the environment has also heavily burdened some rare earth production areas.

——产业结构不合理。冶炼分离产能严重过剩。稀土材料及器件研发滞后，在稀土新材料开发和终端应用技术方面与国际先进水平差距明显，拥有知识产权和新型稀土材料及器件生产加工技术较少，低端产品过剩，高端产品匮乏。稀土作为一个小行业，产业集中度低，企业众多，缺少具有核心竞争力的大型企业，行业自律性差，存在一定程度的恶性竞争。

- Irrational industrial structure. China's rare earth industry has huge over-capacity in smelting and separating. On the other hand, the research and development of rare earth materials and components is lagging behind, its level of rare earth new materials development and end-product application technologies is significantly lower than the advanced international level, and the IPR ownership, and the production and processing technologies of new-type rare earth materials and components are relatively small in number. As a result, low-end products overflow while high-end products are in short supply. China's rare earth metals industry, relatively small in scale, features a low concentration rate with numerous businesses, but lacks large enterprises with core competitiveness. Self-discipline in the industry is also weak, and vicious competition exists to some extent.

——价格严重背离价值。一段时期以来，稀土价格没有真实反映其价值，长期低迷，资源的稀缺性没有得到合理体现，生态环境损失没有得到合理补偿。2010 年下半年以来，虽

然稀土产品价格逐步回归，但涨幅远低于黄金、铜、铁矿石等原材料产品。2000年至2010年，稀土价格上涨2.5倍，而黄金、铜、铁矿石价格同期则分别上涨4.4、4.1、4.8倍。

- Severe divergence between price and value. Over quite a long period of time, the price of rare earth products has remained low and failed to reflect their value, the scarcity of the resources has not been appropriately represented, and the damage to the ecological environment has not been properly compensated for. Since the second half of 2010, despite the gradual rise in the price of rare earth products, the rise has been much lower than that in the price rise of other raw materials like gold, copper and iron ore. From 2000 to 2010, the price of rare earth products rose by 2.5-fold, while that of gold, copper and iron ore increased by 4.4-, 4.1-, and 4.8-fold during the same period, respectively.

图1 1986—2010年中国稀土价格变化



图2 2000—2010年稀土与其他产品价格涨幅对比图

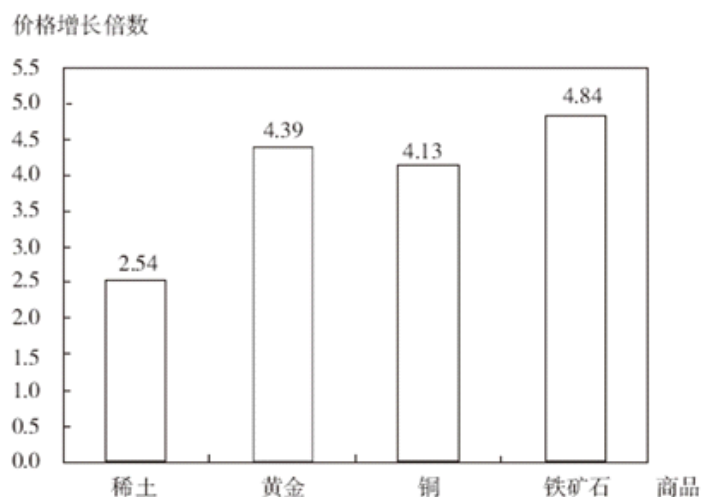


图3 1986—2010年稀土与黄金、铜、铁矿石价格变化比较图



——出口走私比较严重。受国内国际需求等多种因素影响，虽然中国海关将稀土列为重点打私项目，但稀土产品的出口走私现象仍然存在。2006年至2008年，国外海关统计的从中国进口稀土量，比中国海关统计的出口量分别高出35%、59%和36%，2011年更是高出1.2倍。

- Grave smuggling. Due to multiple factors, including domestic and international demand, the smuggling of rare earth products to overseas markets continues to be a problem in spite of the efforts made by China's customs listing it as a key criminal act to crack down on. From 2006 to 2008, the volumes of rare earth products imported from China, according to statistics collected by from foreign customs, were 35 percent, 59 percent and 36 percent higher than the volumes exported, as statistics released by the Chinese customs show, and the figure from foreign customs is 1.2-fold over the Chinese figure in 2011.

针对稀土行业发展中存在的突出问题，中国政府进一步加大了对稀土行业的监管力度。2011年5月，国务院正式颁布了《关于促进稀土行业持续健康发展的若干意见》(以下简称《意见》)，把保护资源和环境、实现可持续发展摆在更加重要的位置，依法加强对稀土开采、生产、流通、进出口等环节的管理，研究制定和修改完善加强稀土行业管理的相关法律法规。中国政府设立稀有金属部际协调机制，统筹研究国家稀土发展战略、规划、计划和政策等重大问题；设立稀土办公室，协调提出稀土开采、生产、储备、进出口计划等，国务院有关部门按职能分工，做好相应管理工作。2012年4月，批准成立中国稀土行业协会，发挥协会在行业自律、规范行业秩序、积极开展国际合作交流等方面的重要作用。《意见》实施一年多来，行业发展方式加快转变，行业发展秩序有了明显改善。

To address the salient problems in the development of China's rare earth industry, the Chinese government has tightened supervision over it. In May 2011, the State Council issued Guidelines on Promoting the Sustainable and Healthy Development of the Rare Earth Industry (hereinafter referred to as the "Guidelines"), attaching more importance to the protection of resources and the environment, and the realization of sustainable development. According to the "Guidelines," the government - in accordance with law - will strengthen control over the mining, production, circulation, import and export, and other links of the rare earth industry, and

study and formulate as well as amend and improve related laws and regulations on the administration of this industry. The Chinese government has established an inter-departmental coordinating mechanism for the rare earth industry to make overall plans and study of the national strategy, program, plan, policy, and other important issues concerning the development of the rare earth industry. The state has also set up a rare earth office to coordinate and propose plans on the mining, production, reserve, and import and export of rare earth materials. The relevant departments of the State Council will perform their respective administrative functions accordingly. In April 2012, Association of China Rare Earth Industry was founded with official approval. It is expected to play an important role in promoting self-discipline in the industry, regulating the industrial order, and proactively carrying out international cooperation and exchanges, among other functions. A year or so has passed since the implementation of the "Guidelines," the transformation of the development pattern of China's rare earth industry has picked up speed, and significant improvement has been seen in its development order.

二、发展原则和目标

II. Principles and Targets of Development

(一)基本原则

1. Fundamental Principles

——坚持保护和节约资源。对稀土资源实施更为严格的生态环境保护标准和保护性开采政策，尽快完善稀土管理法律法规，依法打击各类违法违规行为。

- Adhering to environmental protection and resource conservation. The state will implement stricter standards for ecological protection and protective exploitation policies concerning rare earth resources, improve relevant laws and regulations on the industry's administration, and crack down on all violations of laws and regulations according to law.

——坚持控制总量和优化存量。加快实施大企业集团战略，促进稀土产业结构调整，积极推进技术创新，严格控制开采和冶炼分离能力，淘汰落后产能，进一步提高稀土行业集中度。

- Adhering to total-amount control and optimizing reserves. The state will quicken its steps to implement the conglomerate strategy, promote structural adjustment of the industry, actively push forward technological innovation, strictly control the mining, smelting and separating capacities, phase out outdated capacity, and further increase the concentration rate of the industry.

——坚持兼顾国内国际两个市场、两种资源。对开采、生产和出口采取同步管理措施，鼓励开展国际交流与合作。

- Adhering to giving consideration to both the domestic and international markets and resources. The state will take synchronized administrative measures on rare earth mining , production and export, and encourage international exchanges and cooperation.

——坚持与地方经济社会发展相协调。正确处理局部与整体、当前与长远的关系，维护正常的稀土行业发展秩序。

- Adhering to coordinated development of local economy and society. The state will strive to correctly handle the relations between local and overall development and current and long-term development, and maintain a normal order of industrial development.

(二)主要目标

2. Main Targets

在短期内，建立起规范有序的资源开发、冶炼分离和市场流通秩序，资源无序开采、生态环境恶化、生产盲目扩张和出口走私猖獗的状况得到有效遏制；稀土资源回收率、选矿回收率和综合利用率得到提高，资源开发强度得到有效控制，储采比恢复到合理水平；废水、废气、废渣排放全面达标，重点地区生态环境得到有效恢复；稀土行业兼并重组加快推进，形成规模、高效、清洁化的大型生产企业；新产品开发和新技术推广应用步伐加快。在此基础上，进一步完善稀土政策和法律法规，逐步建立统一、规范、高效的稀土行业管理体系，形成合理开发、有序生产、高效利用、技术先进、集约发展的稀土行业持续健康发展格局。

Within a short period of time, the state will strive to establish a regulated and orderly system of rare earth resource exploitation, smelting and separating, and market circulation, and effectively control the disorderly exploitation of resource, deterioration of the ecological environment, blind expansion of production, and rampant smuggling; increase the recycling rate of rare earth resources, the recycling rate of ore dressing recovery, and the rate of comprehensive utilization, enforce effective control over the intensity of resource exploitation, and restore the reserve-extraction ratio to a proper level. It will make sure the discharge of waste water and gas and slag meet the established standards, and effectively restore the ecological environment in key areas. It will push forward merger and reorganization in the rare earth industry, and develop large-scale, highly efficient, and clean production enterprises. New product development and new technology application will be accelerated. On this basis, the state will further improve related policies and laws and regulations regarding the rare earth industry, gradually establish a unified, standardized, and highly efficient administrative system for the industry, and develop a sustainable and healthy development pattern featuring rational mining, orderly production, efficient utilization, advanced technology and intensive development.

三、有效保护和合理利用资源

III. Effectively Protecting and Rationally Utilizing Rare Earth Resources

稀土作为一种不可再生的自然资源，必须采取措施有效保护、合理利用。多年来，中国努力对稀土实施保护性开采，促进资源的可持续利用。

Rare earths, as a non-renewable natural resource, need to be effectively protected and rationally utilized. As part of its drive to ensure the sustainable use of resources, China has been practicing protective exploitation of its rare earth resources for many years.

20世纪80年代，中国颁布《矿产资源法》，对国家规划矿区、对国民经济具有重要价值的矿区和国家实行保护性开采的特定矿种，实行有计划的开采。1991年，中国决定将离子型稀土矿产列为国家实行保护性开采的矿种，从开采、选冶、加工到市场销售、出口等各个环节实行有计划的统一管理。2006年，中国实施稀土开采总量控制管理。2007年，将稀土生产纳入指令性生产计划管理。2008年国家发布《全国矿产资源规划》(2008—2015年)，对稀土等保护性开采特定的矿种实行规划调控、限制开采、严格准入和综合利用。2009年，国家将保护性开采特定矿种的勘查、开采的登记、审批权限上收。2011年，国家统一调整了稀土矿原矿资源税税额标准，调整后的税额标准为：轻稀土(包括氟碳铈矿、独居石矿)60元/吨；中重稀土(包括磷钇矿、离子型稀土矿)30元/吨，比调整前的0.4元/吨—2元/吨的税额标准有了大幅度提高。国家还建立稀土战略储备制度，实施稀土资源地储备和产品储备，划定首批11个稀土国家规划矿区，编制完成稀土资源重点规划区(矿区)专项规划。严格矿业权管理，实施矿业权设置方案制度，原则上继续暂停受理新的稀土勘查、开采登记申请，禁止现有开采矿山扩大产能。严格控制开采、生产总量，降低资源开发强度，延缓资源衰竭，促进可持续发展。

According to China's Mineral Resources Law promulgated in the 1980s, the state adopts a policy of planned exploitation with regard to mining areas that are embraced in state plans and are of great value to the national economy and specified minerals for which protective exploitation is prescribed by the state. In 1991, China prescribed protective exploitation for ion-absorption rare earth resources, exercising planned, unified control in all related procedures, including mining, dressing, smelting, processing, selling and export. In 2006, China began to exercise total-amount control over the exploitation of rare earths. In 2007, the state incorporated the production of rare earths into management by mandatory planning. In 2008, the state issued the National Plan for Mineral Resources (2008-2015) to exercise planned regulation and control, restrictive exploitation, tightened access and comprehensive utilization for rare earths and some other specified mineral resources, of which protective exploitation is prescribed by the state. In 2009, the state took back the power for registering, examining and approving the prospecting and mining of specified minerals, of which protective exploitation is prescribed by the state. In 2011, China adjusted the tax rates on mining of rare earths. The adjusted new tax rate for light rare earths (including bastnaesite and monazite) is 60 yuan per tonne, and for middle and heavy rare earths (including xenotime and ion-absorption rare earths) is 30 yuan per tonne, much higher than the rates before the adjustment, which ranged from 0.4 yuan per tonne to 2 yuan per tonne. The state also established a strategic reserve system and kept the rare earth reserves in the form of resources and products, designated the first 11 rare earth mining areas to be embraced in state plans, and formulated a special plan for key rare earth mining areas. China has tightened control on mining rights and enforced a system of mining rights allocation plans. In principle, the state has put a moratorium on accepting new registration applications for rare earth prospecting and

mining, and prohibits existing mines from expanding their production capacities. The state exercises strict control over the total rare earth mining and production volumes to reduce resources development intensity, slow the depletion of resources, and advance sustainable development.

近年来，中国开展了稀土开采、生产专项整治行动，多方面对稀土资源进行有效保护和合理利用。通过运用卫星航拍、视频监控、定期检查、月报制度、专用发票监控、举报电话等手段，严控稀土开采总量和指令性生产计划指标。依法坚决打击稀土非法开采和超控制指标开采，坚决打击稀土冶炼分离企业无计划、超计划生产。加强对重点稀土产区的联合监管，依法查处违法违规开采、生产和污染环境、浪费资源、不具备安全生产条件的稀土企业，并依法追究企业和相关人员责任。重新审核已颁发的勘查许可证和开采许可证，向社会公布合法采矿企业名单。加快建立规范稀土开采、生产秩序和监管的长效机制。深入推进稀土企业兼并重组，淘汰落后工艺和产能，实现规模化、集约化生产。通过专项整治，查处、纠正稀土违法勘查和开采行为 600 多起、立案 100 多起，有 13 家矿山、76 家冶炼分离企业停产整改，有效遏制了稀土违法违规开采、生产的势头。

In recent years, China has launched special campaigns to regulate rare earth mining and production, effectively protecting and rationally utilizing rare earth resources in various ways. The state has tightened control of the total volume of rare earth mining and mandatorily planned quotas for rare earth production by means of satellite photography, video monitoring, regular inspection, monthly report system, special invoice checking, and opening phone lines to receive reports concerning violations of related laws and regulations. In pursuance of related laws concerning rare earths, China has cracked down on illegal rare earth mining and mining that exceeded quotas prescribed by the state, as well as on production activities of rare earth smelting and separation enterprises that were unplanned or exceeded the state-set quotas. China also has strengthened joint supervision in key rare earth production areas, investigated and punished rare earth enterprises that conducted mining and production in violation of laws and regulations, polluted the environment, caused wastes in resources, or did not have the necessary conditions to ensure production safety, and called to account those enterprises and individuals responsible for these violations in accordance with the law. The state has re-examined permits for rare earth prospecting and mining, and publicized a list of legitimate mining enterprises. It has also accelerated the formation of a long-term mechanism for regulating the market order and supervision of rare earth mining and production, advancing the merger and reorganization of rare earth enterprises, and phasing out outdated processes and capacities to realize large-scale and intensive production. By way of special rectification campaigns, more than 600 cases of illegal prospecting and mining were investigated and rectified, more than 100 cases were placed on file for further action, and 13 mines and 76 smelting and separation enterprises were ordered to cease production for rectification. In this way, the trend of illegal mining and production has been reversed.

中国政府高度重视稀土资源的综合利用。近年来，国家加强了离子型稀土矿山地质构造研究，积极推进绿色矿山和综合利用示范基地建设，开发绿色高效开采技术，大幅度提高稀土回收率，支持开发新型浮选药剂和选矿设备，提高稀土选矿回收率，开展贫矿和尾矿稀土回收工作。国家促进稀土元素的平衡利用，鼓励镧、铈等相对丰富轻稀土元素的应用研究，加快开发钕、铽、镝等稀缺重稀土元素的减量与替代技术。推进复杂难处理稀有稀土金属共

生矿在选矿和冶炼过程中的综合回收利用，支持稀土矿中铈、钽、钍、镱、钾、萤石等伴生矿产回收利用。

The Chinese government has stressed the comprehensive utilization of rare earth resources. Over the past few years, the state has reinforced research into the geological structure of ion-absorption rare earth mines, advanced the building of "green" mines and comprehensive utilization demonstration bases, developed environmental-friendly and efficient mining technologies to increase the recovery rates of rare earths by a large margin, extended support to the development of new flotation reagents and ore-dressing equipment to raise the dressing recovery rates of rare earths, and worked to recover lean ores and tailings. China promotes balanced utilization of rare earth elements, encourages research into the application of light rare earth elements, such as lanthanum and cerium, whose reserves are relatively abundant, and expedites the development of technology for reducing or providing substitutes for the use of scarce heavy rare earth elements, such as europium, terbium and dysprosium. The state also fosters the comprehensive recycling of paragenetic ores of scarce rare earths that are difficult to recover during the process of ore dressing and smelting, and encourages the recycling of rare earth associated ores, including niobium, tantalum, thorium, strontium, potassium and fluorite.

中国大力支持发展循环经济，积极开展稀土二次资源回收再利用。鼓励开发稀土废旧物收集、处理、分离、提纯等方面的专用工艺、技术和设备，支持建立专业化稀土材料综合回收基地，对稀土火法冶金熔盐、炉渣、稀土永磁废料和废旧永磁电机、废镍氢电池、废稀土荧光灯、失效稀土催化剂、废弃稀土抛光粉以及其他含稀土的废弃元器件等二次稀土资源回收再利用。

China gives great support to the development of the circular economy in this field, and works hard for the recovery and utilization of secondary rare earth resources. The state encourages the development of special processes, technologies and equipment for the collection, processing, separation and refining of rare earth wastes, supports the building of specialized bases for the recovery and utilization of secondary rare earth resources, including molten salts after pyrometallurgy, slag, waste permanent magnet materials and motors, waste NiMH batteries, waste fluorescent lamps, dead catalysts, used polishing powder, and other waste electronic components containing rare earth elements.

四、促进稀土利用与环境协调发展

IV. Better Coordination of Rare Earth Utilization with Environmental Protection

近年来，出于保护环境的需要，中国不断加强、完善对高能耗、高污染、资源性产品和相关行业的管理。在稀土领域，国家更是采取一系列有力措施，促进稀土开发利用与生态环境的协调发展，绝不以牺牲环境为代价换取稀土行业的发展。

In recent years, out of the need of environmental protection, China has been improving its control over high-energy consuming, highly polluting and resource-based products and related

industries. In the rare earth industry in particular, the state has adopted a series of effective measures to better coordinate rare earth development and utilization with environmental protection. China will never develop the rare earth industry at the expense of its environment.

加强对稀土行业的环境管理和相应的法规建设,是促进稀土利用与生态环境协调发展的重要保障。20世纪80年代以来,中国制定了《环境保护法》、《水污染防治法》等十余部环境保护类法律,建立起环境影响评价、污染物总量控制、限期治理等制度。国家颁布实施了《土地复垦条例》,全面落实土地复垦义务,要求实现矿山边开采、边保护、边复垦,修复矿山生态环境。从“十一五”规划(2006—2010年)开始,国家将节能减排纳入国民经济和社会发展规划目标,把降低能源消耗强度、降低化学需氧量和二氧化硫排放作为约束性指标,“十二五”规划(2011—2015年)又将降低二氧化碳排放强度、降低氨氮和氮氧化物排放纳入约束性指标。为进一步加强稀土行业的生态环境保护,2011年国家颁布实施《稀土工业污染物排放标准》,明确了稀土生产企业氨氮、化学需氧量、磷、氟、钍、重金属及二氧化硫、氯气、颗粒物等污染物的排放限值。目前,中国正在研究建立稀土行业环境风险评估制度。

The state has strengthened control of the rare earth industry with regard to environmental protection and formulated relevant laws and regulations, which is essential to the better coordination of rare earth utilization with environmental protection. Since the 1980s, China has enacted about a dozen laws related to environmental protection, including the Environmental Protection Law and the Law on the Prevention and Control of Water Pollution, and established the systems of environmental impact assessment, control of the total pollutant discharge, and ordered treatment of pollution within a time limit. The state promulgated and put into effect the Regulations on Land Reclamation to ensure the full fulfillment of land reclamation obligations, demanding that mining, environmental protection and land reclamation should be conducted concurrently to timely restore the eco-environment that has been damaged by mining. Since the implementation of the 11th Five-Year Plan (2006-2010), the state has listed energy conservation and emission reduction as part of the objectives of national economic and social development, and mandated the targets of reducing the intensity of energy consumption, chemical oxygen demand (COD) and sulfur-dioxide emission. The 12th Five-Year Plan (2011-2015) has added reducing the intensity of carbon-dioxide emission and emission of ammonia nitrogen and nitrogen oxides to the list of mandatory targets. In 2011, to intensify environment protection efforts in the rare earth industry, the state enforced the Pollutant Discharge Standards for the Rare Earth Industry, which sets the limits of COD, and emission of such pollutants as ammonia nitrogen, phosphorus, fluorine, thorium, heavy metals, sulfur dioxide, chlorine gas, and particulates for rare earth enterprises. At present, China has been making studies in the establishment of an environmental risk assessment system for the rare earth industry.

严格执行环境保护的法律法规,是稀土开发利用中保护好环境的关键。近年来,国家严格执行环境影响评价制度,新建、扩建、改建稀土项目必须对可能造成的环境影响作出分析、预测和评估,并提出预防和减轻环境影响的对策和措施,未通过环评不得实施。执行“三同时”制度,稀土建设项目环保设施必须与主体工程同时设计、同时施工,并经环保部门验收后同时投入使用。执行排污许可制度和《稀土工业污染物排放标准》,稀土企业应事先取得环保部门的许可,根据排放标准规定的浓度、数量和方式等实现达标排放,禁止未依法取得许可证擅自排放。执行强制淘汰制度,禁止采用离子型稀土矿堆浸、池浸选矿工艺,禁止开

发独居石单一矿种，禁止采用严重污染环境和破坏生态的工艺，从源头防止生态破坏和环境污染。近年来，国家更加严格地执行稀土矿山地质环境恢复治理保证金制度，督促稀土开采企业严格落实生态环境保护与恢复的经济责任，逐步建立矿山环境治理和生态恢复责任机制。

Earnest enforcement of laws and regulations on environmental protection has been the key to maintaining a good environment while developing and utilizing rare earth resources. In recent years, the state has enforced the environmental impact assessment system to the letter. An analysis, prediction and assessment report of the environmental impact that may be caused by a rare earth construction, expansion or renovation project must be submitted in advance, along with countermeasures to prevent and mitigate the impact. No project shall be implemented before it passes the assessment. To intensify environmental protection efforts in the rare earth industry, the state also strictly observes the stipulation in the Environmental Protection Law that installations for the prevention and control of pollution at a construction project must be designed, built and commissioned together with the principal part of the project, and that a construction project should not be commissioned or used until such installations are examined and considered up-to-standard by environmental protection authorities in charge. China exercises a pollution discharge license system and implements the Discharge Standards of Pollutants for the Rare Earth Industry. Rare earth enterprises are forbidden to discharge pollutants before they obtain pollution discharge licenses from the environmental protection authorities, and should strictly observe the standards on the density, quantity and channels of pollutant discharge. The state adopts a system of compulsory elimination of obsolete processes and equipment, and prohibits the use of tank and heap leaching methods for ion-absorption rare earths and the mining of monazite deposits only. The government also bans the use of technologies that cause heavy pollution and severe damage to the environment, and acts to prevent ecological degradation and environmental pollution at the source. In recent years, China has been stricter in implementing the deposit system for protecting and restoring the geological environment of rare earth mines, urging rare earth enterprises to carry out their economic responsibilities for environmental protection and restoration, and gradually establishing a responsibility mechanism of environmental control and ecological restoration for the mines.

开展稀土行业的环境专项整治。在专项整治中，各级政府明确要求，现有稀土企业必须加快环保设施建设并达标排放，实施清洁生产，否则依法停产，限期整改仍未达标的企业要坚决取缔。从2011年开始，国家对全部稀土矿山、冶炼分离、金属生产企业开展了环保核查工作，严肃查处稀土企业污染环境的行为，已先后公布了两批共56家符合环保要求的企业名单，促使稀土行业、企业投入40多亿元人民币进行环保整治和技术升级，稀土行业的环保水平得到明显提高。对环境污染严重、环境安全隐患突出、群众反映强烈、不符合环保法律法规要求的企业，采取挂牌督办、限期治理等措施依法处罚。各级政府对于历史上形成的生态环境破坏、尾矿和废渣污染等问题，将投入资金进行专项治理。

The state carries out special environmental protection campaigns to regulate the activities of the rare earth industry. In these campaigns, governments at all levels require rare earth enterprises to accelerate the construction of environmental protection facilities, abide by the pollutant discharge standards, and implement clean production. Enterprises that do not meet

these requirements shall be ordered to cease production for pollution control in accordance with the law, and shall be closed down if they still fail to meet the standards after the deadline set for them to correct their ways. An overall environmental protection inspection has been conducted since 2011 on all rare earth mines, smelting, separation and metal production enterprises, investigating and punishing rare earth enterprises responsible for polluting the environment. So far, the state has published two lists of a total of 56 enterprises that have met environmental protection standards. As a result, the rare earth industry and its enterprises have been urged to put in more than four billion yuan on pollution control and technology upgrading, markedly enhancing the environmental protection level of the industry. Regarding enterprises that generate heavy pollution, pose environmental hazards, cause strong complaints from the public, or violate laws and regulations on environmental protection, the state will publicize their cases, urge them to rectify their activities within a specified period of time, supervise their rectification process, and take other disciplinary actions necessary in accordance with the law. Governments at all levels will appropriate funds to address ecological damage and pollution caused by tailings and slag, which have been formed over a long period of time.

五、推进技术进步和产业升级

V. Promoting Technological Advancement and Industrial Upgrading

中国把提高稀土的科学开发和应用技术水平放在重要位置,着力营造政策环境,加快推进稀土技术进步和产业升级,努力破解资源、环境瓶颈制约,为稀土可持续发展提供技术支撑。

China makes it a priority to enhance the level of scientific development and utilization of rare earth products. The state strives to create a favorable policy environment for expediting the technological advancement and upgrading of the rare earth industry, overcoming resource and environmental bottlenecks and providing technological support for the sustainable development of rare earth industry.

国家鼓励稀土行业的技术创新。在《国家中长期科学和技术发展规划纲要(2006—2020年)》中,稀土技术被列为重点支持方向。国家支持稀土基础研究、前沿技术研究、产业关键技术研发与推广应用,推动建立以企业为主体、市场为导向、产学研相结合的技术创新体系。积极开发环境友好、先进适用的稀土开采技术,复杂地质条件高效采矿技术,共伴生资源综合回收技术,提高资源采收率和循环利用水平。大力组织研发低碳低盐排放、超高纯产品制备、膜分离、伴生钪资源回收和利用、尾气氟硫回收处理、化工原料循环利用、生产自动控制等先进技术,实现稀土高效清洁冶炼分离。引导稀土生产应用企业、科研院所和高等院校,大力开发稀土深加工和新材料应用技术。大力培养稀土科技人才,加强知识产权保护和技术标准建设,为稀土技术发展创造良好条件。

The state encourages technological innovation in the rare earth industry. The Outline of the National Program for Long- and Medium-term Scientific and Technological Development (2006-2020) lists rare earth technologies as a key field of research and development to get state support. The state supports basic studies and studies on frontier technologies related to rare

earths, as well as the research and development, application and spread of critical industrial technologies, and promotes the establishment of an enterprise-centered, market-oriented technological innovation system that combines the efforts of enterprises, universities and research institutes. China actively develops environmentally-friendly, advanced and appropriate rare earth exploitation technologies, highly efficient mining technologies suited to complex geological conditions, and comprehensive recovery technologies for paragenetic and associated mineral resources, in order to raise the recovery rates and cyclical utilization levels of the resources. The country makes vigorous efforts in organizing research and development of advanced technologies for low-carbon and low-salt discharge, manufacturing of ultra-pure products, membrane separation, recovery and utilization of associated thorium resources, recovery and treatment of fluorine and sulfur in tail gas, recycling of chemical raw materials, and automatic production control, to realize the efficient and clean smelting and separation of rare earth metals. The government guides rare earth production and application enterprises, scientific research institutes and institutions of higher learning to develop deep processing and new material application technologies. It works hard to foster science and technology personnel, strengthen the protection of intellectual property rights, and establish technological standards, in order to create favorable conditions for the development of rare earth technologies.

近年来,国家加快推进企业技术改造。推动利用原地浸矿等高效绿色采选矿技术和先进设备改造现有稀土矿山,提高资源综合利用、生态修复、环境保护和安全生产水平,建设完善专用尾矿堆存和处理设施,加强尾矿保护与利用。鼓励利用无氨氮冶炼分离、联动萃取分离等先进技术和装备改造现有稀土冶炼分离生产线,降低化工材料消耗和“三废”排放。采用新型低排放、低能耗技术和设备改造稀土金属冶炼企业,提高生产效率和产品质量,降低能耗、物耗。加快淘汰氨皂化分离、氯化物电解、湿法制备氟化稀土等落后工艺和生产能力。支持企业将技术改造与兼并重组、淘汰落后产能相结合,加快推进落后企业关停并转。

Over the past few years, China has accelerated the technological transformation of rare earth enterprises, encouraged the use of efficient and green technologies for mining and ore dressing, such as in-situ leaching, and advanced equipment to renovate rare earth mines, enhanced their performance in comprehensive resource utilization, ecological restoration, environmental protection and safe production. It has built and improved facilities for the storage and treatment of tailings to protect and make better use of tailing resources. The state also encourages the transformation of existing production lines of rare earth smelting and separation by using advanced equipment and technologies, such as separation without using ammonia, and fuzzy simultaneous extraction technology, in order to reduce the consumption of chemical materials and discharge of the “three wastes,” namely, waste gas, waste water and waste residues. New technologies and equipment featuring low discharge and low energy consumption are adopted to renovate rare earth smelting enterprises, to increase production efficiency, improve product quality and lower energy and material consumption. The state is also accelerating the elimination of ammonia saponification extraction, chloride electrolysis, hydrometallurgical synthesis of rare earth fluoride, and other obsolete processes and capacities. It encourages enterprises to combine technological transformation with merger and reorganization and elimination of outdated capacities, in order to get backward rare earth enterprises to close down, suspend operations, merge with others or change their lines of production.

调整优化产业结构是促进稀土行业持续健康发展的重要内容。中国政府严格控制稀土冶炼分离总量，除国家批准的兼并重组、优化布局项目外，停止核准新建稀土冶炼分离项目，禁止现有稀土冶炼分离项目扩大生产规模。坚决制止违规项目建设，对越权审批、违规建设的，依法追究相关单位和负责人责任。调整稀土加工产品结构，控制稀土在低端领域的过度消费，压缩档次低、稀土消耗量大的加工产品产量，顺应国际稀土科技和产业发展趋势，鼓励发展高技术含量、高附加值的稀土应用产业。加快发展高性能稀土磁性材料、发光材料、储氢材料、催化材料等稀土新材料和器件，推动稀土材料在信息、新能源、节能、环保、医疗等领域的应用。鼓励企业加强管理创新，建立现代企业制度，加快产业升级，培育形成资源节约、环境友好、集约发展、积极履行社会责任的现代化企业。

Readjusting and optimizing industrial structure is a crucial step in promoting the sustained and healthy development of the rare earth industry. The Chinese government exercises strict control over the total volume of rare earth smelting and separation, and will not approve any new rare earth smelting and separation projects except for those state-sanctioned projects of merger and reorganization and for distribution optimum. Existing rare earth smelting and separation projects are prohibited from expanding their scale of production. The state resolutely halts the construction of projects that are undertaken in violation of relevant regulations, and will punish, in accordance with the law, departments and individuals responsible for giving approval beyond their authority and those responsible for building the projects in violation of relevant regulations. China adjusts the structure of processed rare earth products, curtails the excessive consumption of rare earth resources by low-end products, and reduces the output of low-grade processed products that require high rare earth consumption. It aims to follow the international scientific and technological and overall industrial development trend and encourage the growth of high-tech rare earth application industries with high added value. In addition, the state expedites the development of high-performance rare earth materials and devices, including magnetic, luminescent, hydrogen-storage, and catalytic materials, and encourages the application of rare earth materials in the fields of information, new energy, energy conservation, environmental protection and health care. The state encourages enterprises to strengthen innovation in management, establish the modern enterprise system, and accelerate industrial upgrading, in order to transform them into modern enterprises that save resources, protect the environment, follow the path of intensive development and actively fulfill their social responsibilities.

六、促进公平贸易和国际合作

VI. Promoting Fair Trade and International Cooperation

对外开放是中国的基本国策。在稀土领域，中国兼顾国际国内两种资源、两个市场，奉行既保持国际市场稀土合理供应，又保护生态环境与资源的双赢战略，不断促进公平贸易和国际交流合作。

Opening up is a basic state policy of China. In the field of rare earths, China gives simultaneous consideration to both domestic and international resources and markets, and follows a win-win strategy that both ensures a reasonable supply of rare earth products onto the

international market and helps protect the environment and resources. China will continue its efforts in promoting fair trade and international exchanges and cooperation in this field.

基于资源环境保护和可持续发展的需要，在统筹考虑国内外市场、资源环境承载能力以及国内生产情况下，中国严格控制稀土开采和生产总量，同步实施有关开采、生产、消费及出口的限制措施，合理确定年度稀土出口配额总量，基本满足了国际市场正常需求。与此同时，严格海关监管，规范企业申报管理，要求稀土出口企业必须符合产业政策、行业准入、环保标准等要求。加强对出口企业的监督管理，强化行业自律，对变相出口稀土产品、从非法渠道采购出口产品及其他扰乱出口经营秩序等行为的企业，依法追究相应法律责任。2011年，开展了打击稀土走私专项行动，共查获稀土走私犯罪案件8起、稀土769吨，抓获走私犯罪嫌疑人23人。同时，国家严格禁止进口放射性物质超标的稀土矿产品。

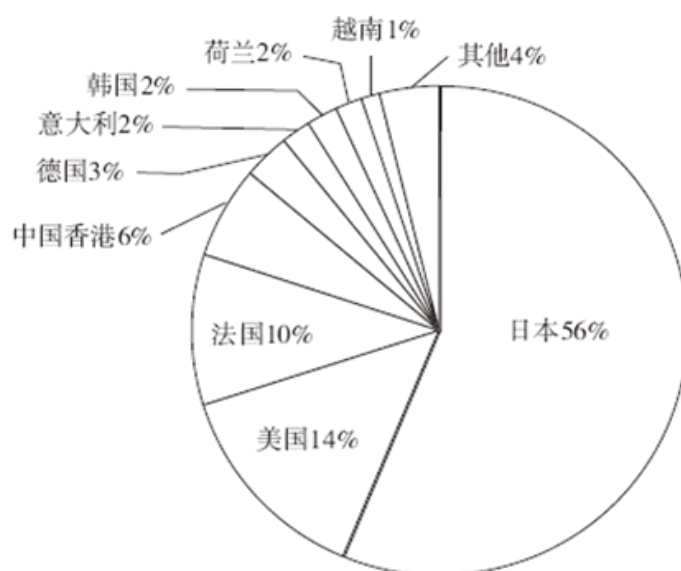
In view of the needs of protecting the environment and resources and developing in a sustainable way, and after giving overall considerations to the domestic and international markets, the carrying capacity of resources and environment, as well as domestic production conditions, China strictly controls the total volumes of rare earth mining and production, and takes restrictive measures on the mining, production, consumption and export of rare earth products simultaneously. The state sets a reasonable quota for annual rare earth exports that basically satisfies the normal demand of the international market. Meanwhile, China tightens customs control, regulates the management of declarations to be filed by enterprises, and orders rare earth export enterprises to comply with the industrial policies, industry access and environmental standards. The state is reinforcing its supervision and control over export enterprises and the self-discipline of the industry. In accordance with the law, it investigates and punishes enterprises that export rare earth products clandestinely, export products procured from illegal channels or commit other acts disrupting the normal order of rare earth export. In 2011, the state carried out a special campaign to crack down on rare earth smuggling, during which it tracked down 769 tons of smuggled rare earth products and 23 criminal suspects in eight cases. Meanwhile, the state strictly bans the import of rare earth products containing radioactive substances that exceed the prescribed limits.

在稀土贸易问题上，中国政府多次表示，中国将继续向国际市场供应稀土。中国对稀土的出口加强管理，是与对稀土的开采、生产等环节加强管理同步实施的。这既符合中国的可持续发展，也符合世界各国的利益。中国反对将稀土问题政治化，愿以建设性和负责任的态度，加强与其他稀土生产国和消费国的对话合作，共同防止稀土市场的过度投机，共同解决产业发展中的资源和环境问题。中国也希望，稀土资源丰富的国家积极开发本国资源，拓展国际市场供应渠道，实现稀土供应多元化，扩大贸易规模，共同承担全球稀土供应的责任，满足世界经济持续发展的需要。

Regarding rare earth trade, the Chinese government has reiterated on more than one occasion that China will continue its rare earth supply to the international market. The tightened control over rare earth export by the Chinese government is carried out in concert with that over the mining, production and other links of the rare earth industry. This is in alignment with China's sustainable development and the interests of all countries in the world. China opposes politicizing the rare earth issue, and is willing to strengthen dialogue and cooperation with other

rare earth producers and consumers in a constructive and responsible manner, to work together with them in preventing excessive speculation in the rare earth market and solving the resource and environmental problems in the development of the industry. It also hopes that countries and regions with abundant rare earth reserves will make active efforts in developing their own re-sources to diversify the supply and expand rare earth trade in the international market, shouldering together the responsibility of global rare earth supply in order to meet the needs of the sustainable development of the world economy.

图4 2011年中国稀土出口分布图



近年来，中国积极营造公平、开放的投资环境，鼓励外商投资稀土环境治理、废旧产品回收再利用和高端应用及装备制造产业。目前，美国、德国、法国、加拿大、日本等国家的企业已在中国投资稀土产业，有独资、合资企业 38 家，投资额达 61 亿元人民币，这些产品主要用于出口，满足其本国市场需求。中国鼓励国内企业按照国际惯例和市场规则，积极参与国际稀土领域的技术经济合作。

In recent years, China has been actively creating a fair and open environment for foreign investment, encouraging foreign investment in environment restoration, waste product recycling, and high-end application development and equipment manufacturing in the rare earth industry. Enterprises from the United States, Germany, France, Canada and Japan have invested a total of 6.1 billion yuan in China's rare earth industry, establishing 38 sole-proprietorship and joint-venture enterprises. Their products are mainly made for export to meet the needs of the mother countries of these investors. China encourages domestic enterprises to follow international practice and market rules to participate actively in international technological and economic cooperation in the field of rare earths.

中国积极参与稀土领域的国际交流。先后建立了国际稀土开发与应用研讨、国际稀土高峰论坛、包头国际稀土论坛等学术交流平台。积极参与国际稀土永磁与应用组织、国际显示与照明组织等开展的相关活动，与美国、欧盟、俄罗斯、日本等开展广泛的双边和多边交流

与对话，沟通信息，增进了解，共同推进世界稀土科技和产业的持续发展。

China has actively participated in international exchanges in the field of rare earths. It has consecutively established the International Conference on Rare Earth Development and Application, International Rare Earth Industry Summit, Baotou Rare Earth Industry Forum, and other platforms for academic exchanges. China has taken an active part in activities held by the International Workshop on Rare Earth Permanent Magnets, International Commission on Illumination and other related international organizations. It has conducted bilateral and multilateral exchanges and dialogues on a broad range of issues concerning rare earth with the US, the EU, Russia and Japan, to share information, enhance mutual understanding, and work hand in hand to promote the sustainable development of rare earth science and technology and the rare earth industry as a whole.

稀土行业的持续健康发展，关系到稀土这一重要自然资源的永续利用，更关系到人类赖以生存的地球家园的和谐美好。当今世界，各国相互依存、共生共荣，在稀土问题上应该加强合作，共担责任，共享成果。在未来的岁月里，中国将坚持科学发展观，完善稀土政策，加强行业管理，与国际社会一道，维护公平合理的稀土市场秩序，促进稀土开发利用与资源环境相协调，为世界经济和科技发展作出新的贡献。

The sustained, healthy development of the rare earth industry is crucial to the sustainable use of rare earth reserves as important natural resources of the world, as well as to the protection of Planet Earth, which is home to all mankind. Nowadays, as all countries depend on each other for existence and prosperity, they should strengthen cooperation and share responsibilities and achievements. In future, China will adhere to the Scientific Outlook on Development, improve its rare earth policies, reinforce supervision over the industry, and work closely with the international community to safeguard a fair and rational order of the rare earth market, better coordinate rare earth development and utilization with the protection of the environment and resources, and make new contributions to the world's economic growth and scientific and technological development.

