

Boron: Global industry markets & outlook

ARE YOU FACING BIG DECISIONS INVOLVING BORON?

The market for Boron is global, and local events can make waves across the world. If you're involved with boron in any way, you know that everything's important – both the small details and the big picture. A complete perspective is essential, whether you're preparing a company strategy, planning exploration, bringing new products to market, buying, selling or investing.

MAKE THE RIGHT CHOICE

Whatever your challenge, this report gives you deep insights to help you make really well-informed recommendations or decisions. It's a detailed account of:

- World production and consumption
- The operations of the major producers
- End-use market applications
- Price trends
- International trade patterns
- Forecasts for supply, demand and prices

IS THIS REPORT FOR YOU?

Our clients include anyone with an interest in the evolving boron market, anywhere in the world. Readers of past reports have come from a wide range of relevant industries – from extraction to end-use, from mines to factories to banks, from existing players to new entrants. And they range from analysts and researchers to operational managers and chief executives.

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WHAT READERS SAY

“When we review project or company opportunities, the most important area of review is the marketplace. We have always deferred to Roskill reports and their services for the prime benchmark reference point.”

Michael Kiernan,
Consolidated Minerals Limited,
Australia

“Roskill has been a key reference to our industry for a long time...the best reference about the market and industries.”

Bayram AnKarali
Etimine SA, Turkey

“One of the few sources available for critical, detailed and reliable information on the industrial minerals markets.”

Emilio Lobato,
Technical Marketing Manager,
Magnesita Refrataros SA, Brazil

GET ACCURATE ANSWERS FROM INDEPENDENT EXPERTS

- Where will future expansions in mine supply be located?
- Which companies dominate production of fibreglass in China?
- Will production of boric acid from brine have a significant impact on supply?
- What is the main driver behind forecast growth in demand for FeB of 10-15%py
- What are the main applications for borosilicate glass?
- What is the outlook for boron prices?

WHY READERS CHOOSE ROSKILL

We're approachable. Our sources include a large network of industry contacts: the key players talk to us because we're approachable and because they know us well.

We're independent. The information and insights in Boron: Global industry markets & outlook are completely independent. We're privately-owned and not beholden to anyone. Our expert researchers make a thorough and objective analysis of all available data, from sources across the globe.

We're expert. You want facts from people who know what they're talking about. Roskill's experts have been analysing the boron industry for over 30 years and this is our 12th report on this sector.

Approachable. Independent. Expert.

That's why no other report can match the accuracy, depth and expertise of Boron: Global industry markets & outlook.

WHAT ELSE CAN WE DO FOR YOU?

We also offer expert bespoke consultancy to help you tackle specific complex challenges, such as feasibility studies, market assessments or due diligence reports.

If you'd like to discuss a project, please email judith@roskill.co.uk or call +44 20 8944 0066.

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What's included?

Contents: 243 pages, 151 tables, 41 figures plus appendix

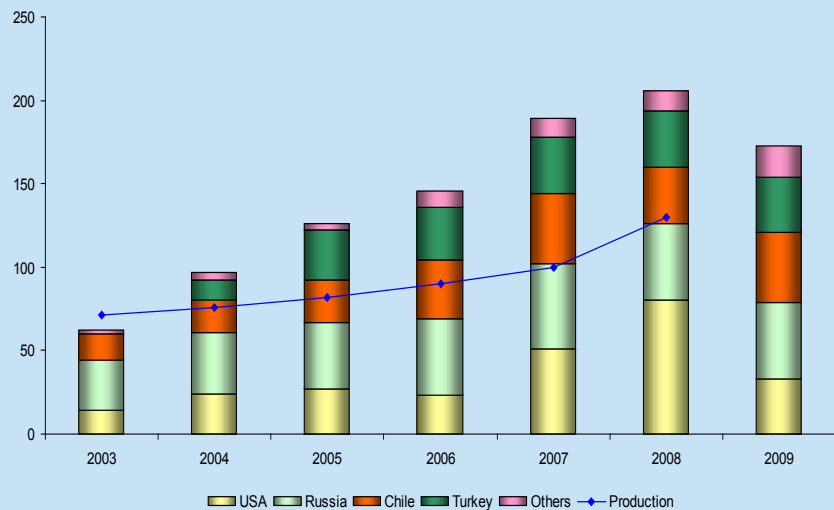
Overview

Global demand for borates grew strongly in the three years to 2008, at up to 8%py, largely driven by growth in the Chinese market – now the world's largest – where consumption rose by 15%py from 2000 to 2008. Growth in the market share held by Asian countries partly reflects the shift in production of textile-grade fibreglass, borosilicate glass and ceramics away from North America and Europe to countries with lower production costs.

Following the years of strong growth, 2009 saw a sharp drop in demand for borates, but, in the second half of the year, markets for both textile-grade fibreglass and borosilicate glass recovered and demand for borosilicate glass in LCD screens is expected to grow by 15% in 2010. An up-turn in construction activity should provide a recovering market for insulation-grade fibreglass in the medium term.

World production of natural and refined borates remains highly concentrated in Turkey and the USA; the two countries accounting for around 75% of supply. Chinese boron is inadequate in terms of both quantity and grade to meet domestic demand so the country is now the largest importer of both natural borates and boric acid.

This report gives you a full analysis of the key trends, issues and developments in the market, a clear insight into all areas of the industry and an authoritative analysis of its prospects.



1. SUMMARY

2. INTRODUCTION AND OCCURRENCE OF BORON MINERALS

3. MINING AND PROCESSING OF BORATES

- Boron minerals, refined borates, boric acid

4. WORLD PRODUCTION OF BORATES

- Boron minerals, boric acid, future acids in production of borates

5. REVIEW OF BORATE-PRODUCING COUNTRIES AND COMPANIES

- Detailed analysis of 34 countries and over 120 companies

7. INTERNATIONAL TRADE IN BORATES

- Trade in natural borates; boric acid; refined borax; perborates

8. END-USES FOR BORATES

- Glass - fibreglass & borosilicate glass
Ceramics - glasses, enamels, tilebodies
Fertilisers

Detergent - laundry detergent & other cleaning products

Flame retardants - plastics, rubber, cellulose

Other applications including wood preservatives, paints & coatings, pharmaceuticals & toiletries, adhesives, industrial fluids, plasterboard, paper, metallurgical, batteries, catalysts, fuel cells, hard materials

9. PRICES OF BORATES

- Prices of natural borates, refined borates; future trends in prices of borates

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