The Economics of Feldspar

Eleventh Edition, 2008

Read the definitive report on the global feldspar industry, its markets and its future

What this report gives you:

- Independent, in-depth research and analysis
- Essential market intelligence for successful business planning
- Detailed survey of production and processing in over 50 countries
- Up-to-date profiles of the activities of over 120 producing and processing companies and potential projects, including Gruppo Minerali, Imerys, Unimin, Esan Eczacibasi Industrial Raw Minerals and CIne Almaden
- Forecasts for end-use consumption & world supply & demand

A valuable resource for:

- Chief executives
- Market researchers
- Information centres
- Strategic planners
- Financial analysts
- Product developers

Increased concentration in control over industry

Consolidation of the industry over the past several years has increased concentration in the hands of a few large companies. Six companies produce over 1Mtpy compared to an industry average of less than 100,000tpy. The six largest producers are Gruppo Minerali (3.0Mtpy capacity mainly in Italy), Imerys (1.5Mtpy capacity mainly in France), Esan Eczacibasi Industrial Raw Minerals (1.2Mtpy), Cine Akmaden (1.4Mtpy), Kaltun (1.4Mtpy) and Unimin/Sibelco (1Mtpy capacity worldwide). Together they account for about 10Mtpy of capacity or almost 50% of world production.

Economic deposits of feldspar are known in at least seventy countries with production currently undertaken in over fifty countries. Roskill estimates total production of feldspars and associated aplite, phonolite and China stone in 2006 at 20Mt, plus 1.4Mt of nepheline syenite used in competitive applications with feldspar. About 1Mtpy of additional nepheline syenite for use in making alumina and for aggregates is also produced.

Once available only from Canada. Norway and Russia, nepheline syenite projects in a number of countries have been developed. Brazil, China and Turkey have brought nepheline syenite projects into production for feldspathic uses and Iran is doing a feasibility study for its use in alumina production. Nepheline syenite has also been used for some time in South Africa and the USA for road aggregates and roofing granules.

Report Highlights

The market for feldspathic minerals is dominated by the ceramics and glass industries, which together account for over 90% of all material produced. Within these applications, ceramic whitewares and container glass are the most important, with ceramic glazes, frits, fibreglass, flat glass, dinnerware and other speciality glass making up most of the remainder.

In 2006, the ceramics industry consumed an estimated 14.6Mt of feldspar and nepheline syenite or around 68% of total world demand. The most important types of ceramics in terms of feldspathic mineral consumption are floor and wall tiles, ceramic dinnerware and sanitaryware. The main centres of ceramics production are Italy, Spain, China, other South East Asian countries and Latin America. The production of ceramics in these areas, and in particular Italy, Spain and China, has been the main driver behind the steady rise in feldspar demand seen over the past several decades, and will remain a major factor in future growth in the feldspar industry.

Demand for feldspar and associated minerals is forecast to increase on average at 5.5%py to 29.5Mt by 2012, with the main growth to be concentrated in Southeast Asia, Eastern Europe and Latin America. This will raise production levels by 38% over 2006 levels. World resources are more than adequate to meet this demand.

Historically, US prices for feldspar have a high correlation with the Consumer Price Index and this is likely to be similar in other countries because the abundance and wide distribution of feldspathic materials offers no power to an individual supplier to exercise price discretion. Price is therefore almost purely a sum of inputs plus a modest profit. Using the long term average CPI annual growth rate in the US of 3.43%py indicates that the average value/t in the US for feldspar and nepheline syenite will grow from US$68.30/t in 2006 to around US$81/t in 2012.

Sources and Methodology

This report is the result of an extensive programme of research by Roskill analysts. They have conducted a close appraisal of information from a wide variety of sources, including governments, trade associations, company sources, official organisations, trade journals and technical literature.

Information gathering is only the first step in preparing a report. The data is then extensively analysed so that the finished report provides a comprehensive insight into the industry today, as well as top-level analysis of the long-term prospects.

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