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Some highlights from the report

World production of fluorspar reached 5.5Mt in 2008, thus nearing the peak of fluorspar production of 1989. In the years from 1989 to 1994, production declined to 3.5Mt as the adverse impact of the Montreal protocol on the use of flurocarbons worked it way through to the supply side. Output recovered slowly between 1994 and 2002 before growth accelerated to 5%py from 2003 to reach 5.45Mt in 2007. Most of this growth came from increased output of acidspar in China and Mexico.

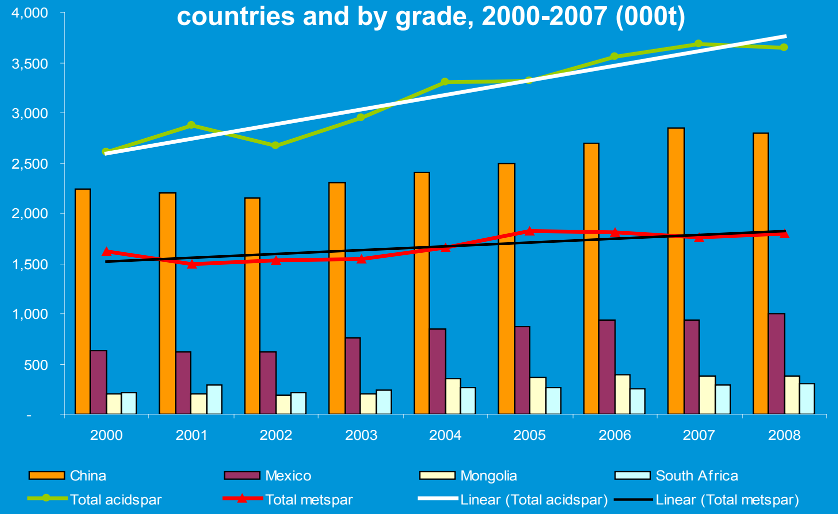
Five countries, China, Mexico, Mongolia, South Africa and Russia, accounted for 86% of world production in 2007. The role of the leading producer, China, has changed significantly over the last 20 years. Chinese exports of fluorspar began to increase from the mid 1980s and by the early 1990s, China was established as the major source of supply for many countries. Mine production elsewhere declined in response to Chinese low prices and diminishing consumption in fluorochemicals in the main industrialised countries. Following a period in the mid to late 1990s when fluorspar producers elsewhere sought to protect their markets by mean of anti-dumping measures, the Chinese government introduced a number of actions, including export quotas and taxes, which significantly reduced supply of fluorspar to the international market.

The diminishing availability of fluorspar from China and strong growth in demand from 2002 to mid 2008 has led to a number of proposed new mining operations. Of the total identified potential output of 1.4Mt, about 0.7Mt has acquired significant funding. The remaining projects are either at a pre-feasibility or bankable feasibility stage.

Over the past decade as a whole, demand for fluorspar has grown by just over 2.2%py but in the years from 2003 to 2007, growth rates exceeded 4%py as the industry started to recover from the effects of restrictions on the use of some fluorocarbons. Of the 5.5Mt of fluorspar consumed in 2007, an estimated 50% was used in the manufacture of chemicals, 24% in iron and steel and 17% in the manufacture of aluminium. Growth has been associated with production of chemicals and aluminium fluoride, both of which are derived from acidspar. This has led to some tightness in supply of acidspar, as production has grown by 6.6%py since 2002 while consumption has grown by 7.4%py over the same period.

For the full list of contents, including 141 tables and 77 figures, please visit **www.roskill.com/reports/fluorspar**

World: Production of fluorspar by leading producing countries and by grade, 2000-2007 (000t)



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