

Salt: Global industry markets & outlook

ARE YOU FACING BIG DECISIONS INVOLVING SALT?

The market for salt is global, and local events can make waves across the world. If you're involved with salt 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, 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 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 salt 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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“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 Refratrios SA, Brazil

GET ACCURATE ANSWERS FROM INDEPENDENT EXPERTS

- Who are the leading producers of salt?
- Which countries dominate the supply of salt on international markets?
- Which chemical companies have captive brine sources?
- How do consumption patterns vary between regions?
- Where can rock salt be sourced to meet winter de-icing demand?
- How important will China be to future growth in the salt industry?

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 “Salt: 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 Salt industry for over 40 years and this is our 13th report on this sector.

Approachable. Independent. Expert.

That's why no other report can match the accuracy, depth and expertise of “Salt: 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: 336 pages, 192 tables, 76 figures plus trade appendix

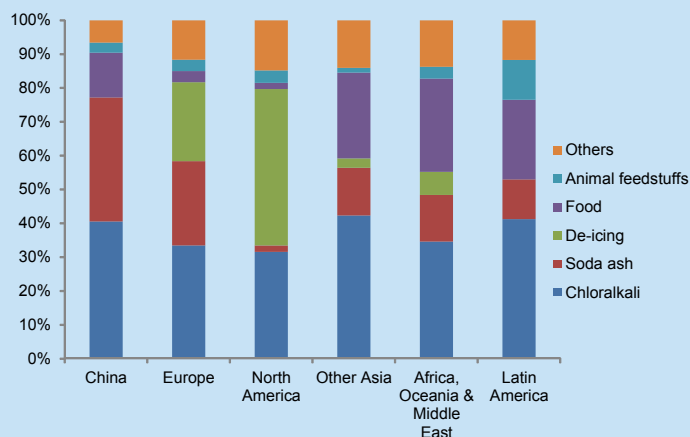
Overview

Growth in salt consumption during the mid- to late- 2000s was driven by the chemicals sector, which now accounts for over 55% of salt demand. Increased chloralkali and synthetic soda ash output in Asia, but more specifically China, was largely responsible for a rise in salt consumption to 260Mt in 2008. Consumption fell by 8% year-on-year in 2009, due to recession in Europe and North America, but recovered strongly in 2010 as Asian economic growth continued and colder-than-average winters increased salt demand for de-icing in the Northern Hemisphere. Asia now accounts for 43% of total salt demand. Demand for salt is forecast to increase by 3.3%py through 2015, to almost 300Mt.

Solar evaporation of seawater or inland brines accounts for 40% of salt production, the remainder is divided between mined rock salt and solution mining. World output of salt totalled 262Mt in 2009, a rise of nearly 3%py from 222Mt in 2003, and was broadly stable in 2010. Regional growth was led by Asia, which accounted for 25% of world output in 2003 and for 34% by 2009. Six countries, each with output of more than 10Mtpy, account for over 60% of the world total. China overtook the USA to become the largest producer in 2006 and Chinese output reached 64Mt in 2010. K+S Group is the world's largest salt producer, followed by CNSIC in China and Cargill in the USA.

Planned increases in production capacity and expansions under consideration worldwide have the potential to add more than 30Mtpy capacity through 2015. China is forecast to account for some two-thirds of this total, with few significant expansions for chemical-grade salt planned outside Asia. Historically, salt prices have increased by 3-4%py, reflecting rising production costs. Late 2010 saw higher prices as the supply of salt tightened. If Chinese production capacity fails to come on-stream as planned, rising demand from the chemicals sector is likely to exert upward pressure on chemical-grade salt prices through the early 2010s.

World: Consumption of salt by end-use, by region, 2009



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.

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