

Soda Ash: Market Outlook to 2015

ARE YOU FACING BIG DECISIONS INVOLVING SODA ASH?

The market for soda ash is global, and local events can make waves across the world. If you're involved with soda ash 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 price

IS THIS REPORT FOR YOU?

Our clients include anyone with an interest in the evolving soda ash 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.

To order your report, visit www.roskill.com/soda-ash or call +44 20 8944 0066 now

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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 Refratarios SA, Brazil

GET ACCURATE ANSWERS FROM INDEPENDENT EXPERTS

- When will soda ash demand recover to pre-recession levels?
- Does increased glass recycling pose a significant risk to soda ash consumption?
- How might new capacity in Turkey affect producers in Europe?
- Who has benefited from the recent round of industry consolidation?
- Will the USA outperform China in their growing export markets?
- What next for China and can its output growth be maintained?

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 Soda Ash: Market Outlook to 2015 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 soda ash industry for over 30 years and this is our 11th report on this sector.

Approachable. Independent. Expert.

That's why no other report can match the accuracy, depth and expertise of Soda Ash: Market Outlook to 2015.

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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Soda Ash: Market Outlook to 2015

What's included?

Contents: 402 pages, 179 tables, 178 figures plus appendix

Overview

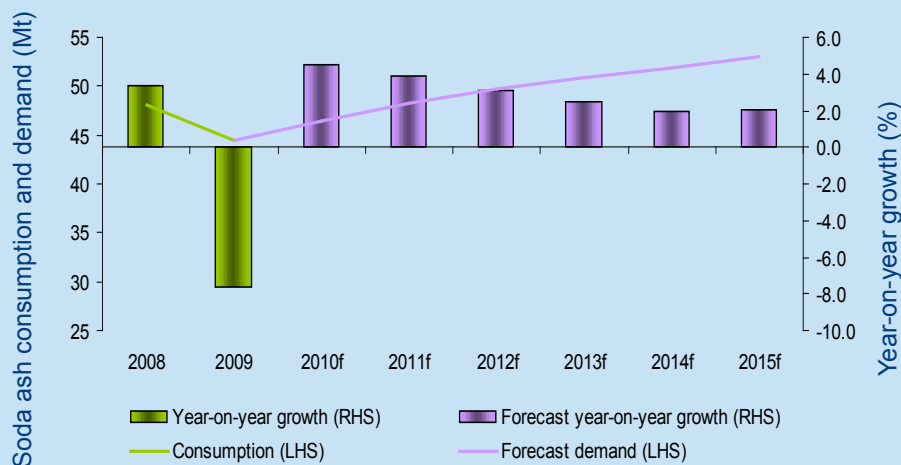
Demand for glass and detergents in emerging markets surged between 2000 and 2008 and soda ash consumption rose by 4.2%py to a peak of 48.1Mt. However, the global economic downturn caused demand for these products to fall sharply in 2009 and soda ash consumption fell by almost 8% year-on-year. While North America and Europe were the worst affected regions, consumption in emerging markets, excluding China, also fell. The most significant gains in production from 2000 to 2009 came from China, where output more than doubled to 18.7Mt, 42% of worldwide production in 2009. Low costs and access to freight assisted China in becoming a key exporter, taking market share in Southeast Asia and South

America from the previously dominant natural soda ash producers in the USA.

The mid-2000s also saw a period of industry consolidation, notably with Indian producers acquiring assets in North America, Europe and Africa. China accounted for almost 90% of new or expanded capacity from 2000 to 2008, but new plants were also commissioned in Argentina, Turkey and Uzbekistan. Soda ash production is an energy intensive process and rising costs were a major contributing factor to a sharp increase in prices in 2007 and 2008. Energy surcharges and formula-based contracts have become increasingly common in soda ash purchasing.

Demand for soda ash is slowly returning to pre-recession levels in mature markets. Emerging market demand, particularly for flat glass and detergents, will continue to be the growth driver, but rates are forecast to be lower in the period to 2015 (3%py) than witnessed in the mid-2000s. Chinese capacity continues to expand at a rapid pace, but rationalisation of older and less efficient plant could occur. Elsewhere, exports of natural soda ash from Turkey are putting increasing pressure on producers in neighbouring regions, notably those in Europe. Energy costs are unlikely to fall further meaning prices could bottom-out in 2010 and increase steadily going forward.

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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