

Ultralightweight Aggregates: Global industry markets & outlook

ARE YOU FACING BIG DECISIONS INVOLVING PERLITE, VERMICULITE OR PUMICE?

The market for ultralightweight aggregates is global, and local events can make waves across the world. If you're involved with perlite, vermiculite and pumice 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

IS THIS REPORT FOR YOU?

Our clients include anyone with an interest in the ultralightweight aggregates 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/ultralightweight-aggregate or call +44 20 8417 0087 now.

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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 Refrataria SA, Brazil

GET ACCURATE ANSWERS FROM INDEPENDENT EXPERTS

- How does the supply versus demand versus grade availability of vermiculite concentrate affect its price?
- Who are the major producers of perlite, vermiculite and pumice?
- How will demand for ultralightweight aggregates develop in coming years?
- In which end-uses do ultralightweight aggregates products compete?

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 “Ultralightweight Aggregates: 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 Ultralightweight Aggregates industry for over 40 years.

Approachable. Independent. Expert.

That's why no other report can match the accuracy, depth and expertise of “Ultralightweight Aggregates: 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 8417 0087.

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What's included?

Contents: 302 pages, 217 tables, 84 figures plus trade appendix

Overview

The main markets for ultralightweight aggregates (perlite, vermiculite and pumice) are in construction, insulation and horticulture. These industries take advantage of their low density, good insulation, inertness and fire resistance. Total consumption of ultralightweight aggregates was estimated at almost 14.5Mt in 2009, split between perlite (3.5Mt), vermiculite (0.6Mt) and pumice (10.3Mt). Growth in consumption of perlite and vermiculite has been dominated by Asia over the last five years, as construction levels in the more mature economies of Europe and North America have fallen. Pumice consumption is more heavily influenced by local availability; Europe and the Middle East account for more than 50% of demand.

China, Greece, Turkey and the USA together accounted for 80% of world perlite output in 2009. S&B Industrial Minerals is the largest producing company, with operations in Europe and China; World Minerals in the USA and IPM Iperlit in Turkey are also major producers. Production in China comprises many small producers. Vermiculite production is concentrated in South Africa (41% of world output in 2009), the USA (21%) and China (21%). Palabora Mining Company in South Africa is the largest vermiculite supplier worldwide. W.R. Grace and Virginia Vermiculite in the USA and Xinjian Yuli Xinlong in China are also major producers. Production of pumice is concentrated in Turkey, Germany, Greece, Chile and the USA.

Prices for expanded perlite vary from US\$200-560/t and are driven mainly by the costs of expanding the mineral. Pumice prices were US\$40/t FOB Turkey in 2009 but are probably much lower in domestic markets. The price of unexpanded vermiculite concentrate has almost doubled since 2008, reaching US\$400-850/t FOB Antwerp in mid-2011. Prices for coarse grade material, which is in short supply due to declining output from Palabora in South Africa, have risen most sharply. However, vermiculite supply from new producers could offset future declines, thereby limiting further price rises in the medium- to long- term.

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.

South Africa: Unit value of exports of vermiculite (US\$/t)



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