

Zirconium: Global industry markets & outlook

ARE YOU FACING BIG DECISIONS INVOLVING ZIRCON, ZIRCONIA AND ZIRCONIUM?

The market for zirconium is global, and local events can make waves across the world. If you're involved with zirconium 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 zirconium 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/zirconium or call +44 20 8944 0066 now.

Zirconium: Global industry markets & outlook

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 Refrataros SA, Brazil

GET ACCURATE ANSWERS FROM INDEPENDENT EXPERTS

- Who are the main producers of zircon?
- How will the global market for zircon change to 2015?
- What zircon projects are expected to open by 2015?
- What is the outlook for the supply/demand balance in the zircon market
- How much zircon do Chinese consumers use?
- What is the forecast for zircon prices to 2015?

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 “Zirconium: 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 Zirconium industry for over 40 years and this is our 8th report on this sector.

Approachable. Independent. Expert.

That's why no other report can match the accuracy, depth and expertise of “Zirconium: 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.

Zirconium: Global industry markets & outlook

What's included?

Contents: 350 pages, 200 tables, 78 figures plus trade appendix

Overview

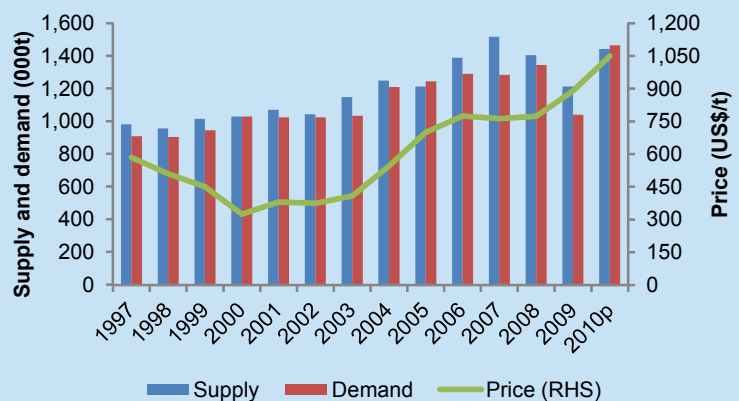
Zircon consumption rebounded strongly in 2010, to 1.33Mt, after recession in 2009 reduced consumption by 18% over 2008. Consumption of zircon in Asia increased by 9.5%py between 2000 and 2010 and offset declines in North America and Europe. Growth in ceramics output, which accounted for 54% of zircon consumption in 2010, particularly in China but also in other emerging economies such as Brazil, India and Iran, was a key driver for increased demand for zircon in the mid-2000s. Consumption of zircon in zirconium chemicals, including zirconia, more than doubled between 2000 and 2010, meanwhile refractory and foundry end-uses exhibited lower rates of growth.

Production of zircon is concentrated in Australia (40% of output in 2010) and South Africa (30%). The remainder is produced in over a dozen other countries. Output of zircon increased by 2.8%py between 2002 and 2010. Major producers, such as Iluka Resources, Richards Bay Minerals, Exxaro Resources and DuPont, extract zircon as a by-product during titanium minerals extraction. Demand for titanium minerals has not increased as fast as that for zircon over the last decade, therefore producers have started to develop and exploit mineral sands deposits with higher zircon contents, such as those in Victoria and South Australia.

Despite lower consumption in 2009, prices for zircon did not fall sharply as major producers reduced output and drew down stocks. In 2010, production could not keep pace with demand, primarily because Chinese imports of zircon grew by over 50% in 2010, to 0.7Mt. Prices started to rise in the second half of the year and had reached record levels in early 2011. Demand for zircon is forecast to increase by 5.4%py through 2015, but capacity might rise by only 2.3%py. Additional supply will therefore continue to be limited and prices may well continue to increase until new projects are commissioned.

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.

World: Supply, demand and price of zircon, 1997-2010



1. SUMMARY
2. ZIRCONIUM MINERALOGY, OCCURRENCE AND RESERVES
3. MINING, PROCESSING AND PRODUCTION OF ZIRCON, ZIRCONIUM CHEMICALS AND ZIRCONIUM METAL
4. WORLD PRODUCTION OF ZIRCONIUM MINERALS
5. WORLD PROCESSED ZIRCON CAPACITY
6. PRODUCTION AND PROCESSING OF ZIRCONIUM MINERALS, CHEMICALS AND METAL BY COUNTRY
7. INTERNATIONAL TRADE IN ZIRCONIUM MINERALS AND PRODUCTS
8. CONSUMPTION OF ZIRCON, ZIRCONIA AND ZIRCONIUM METAL
9. USE OF ZIRCON AND ZIRCONIA IN TRADITIONAL CERAMICS
- 10.-13. USE OF ZIRCON IN: ZIRCONIUM CHEMICALS; FOUNDRY SANDS; ZIRCON AND ZIRCONIA IN REFRACTORIES; ZIRCON IN OTHER APPLICATIONS
14. PRICES OF ZIRCON AND ZIRCONIUM PRODUCTS

Full table of contents @ www.roskill.com/zirconium

