

Gallium: Global industry markets & outlook

ARE YOU FACING BIG DECISIONS INVOLVING GALLIUM?

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

- What is the estimated demand for gallium in 2010?
- What are the main sources of scrap used in secondary refining?
- What are the potential new uses for gallium over the next decade?
- Which companies are planning additions to virgin gallium capacity?
- Which companies are the major producers of virgin gallium?
- What are the main factors affecting future price trends?

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 “Gallium: 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 gallium 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 “Gallium: 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: 107 pages, 37 tables, 14 figures

Overview

Gallium may be scarce but it is not rare. It is more abundant than many better-known metals such as antimony, molybdenum, silver and tungsten, but, unlike these elements, gallium is rarely, if ever, found in economic concentrations of natural minerals. The two major sources of commercial gallium are its extraction from the Bayer liquor in the production of alumina from bauxite and the residues arising from leaching of zinc oxide prior to electrolysis.

Much of the capacity for production of virgin gallium is now located in China, Germany and Kazakhstan, following a reduction in the number of companies refining gallium in Russia and the closure of a plant in France. China is set to

increase virgin gallium capacity from 141tpy in 2010 to 206tpy by the end of 2011.

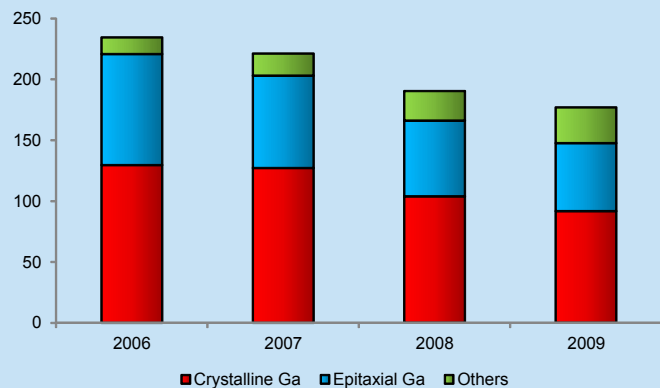
A significant proportion of gallium is from secondary production, particularly from the recycling of GaAs wafers and the waste arising from liquid phase epitaxy. The main centres for secondary production are Japan and North America. There is little evidence that much effective recycling takes place in China, despite the fact that the country is becoming a major consumer of gallium. The gallium market is robust; in 2010 demand for the metal was strong from both electronic and optoelectronic sectors. Major supply drivers include the growing demand for smart phones

and multi-band, multimode handsets as well as the use of LEDs in lighting and display screens. In China, around half of identified consumption is used in NdFeB magnetic materials, a pattern not repeated elsewhere in the world, but which has potential for growth in Japan.

Forecast demand for gallium will grow at around 15%pa to 2015 and this increased demand will be met from both existing excess capacity, particularly in secondary refining, and from new primary capacity planned for China and, possibly, North America. An untapped reserve of secondary material will accumulate in China while recycling remains at a low level.

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: Demand for gallium (t)



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