

# Molybdenum: Market Outlook to 2014

## ARE YOU FACING BIG DECISIONS INVOLVING MOLYBDENUM?

The market for molybdenum is global, and local events can make waves across the world. If you're involved with molybdenum 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 molybdenum 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/molybdenum](http://www.roskill.com/molybdenum) or call +44 20 8417 0087 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 Refrataria SA, Brazil

## GET ACCURATE ANSWERS FROM INDEPENDENT EXPERTS

- What are the main drivers for future demand for molybdenum in alloy steels?
- How will increasing demand for low sulphur diesel affect demand for molybdenum in catalysts?
- How will demand for molybdenum evolve in the years to 2014?
- How much new mine and roaster capacity will be needed by 2014?
- What proportion of this new capacity will be located in China?
- Which ten companies account for 60% of world production?
- Will prices return to US\$34/lb or higher before 2014?

## 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 Molybdenum: Market outlook to 2014 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 molybdenum industry for over 30 years and this is our 10th report on this sector.

### **Approachable. Independent. Expert.**

That's why no other report can match the accuracy, depth and expertise of Molybdenum: Market outlook to 2014.

## 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](mailto:judith@roskill.co.uk) or call +44 20 8417 0087.

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## What's included?

Contents: 337 pages, 154 tables, 86 figures plus appendix

## Overview

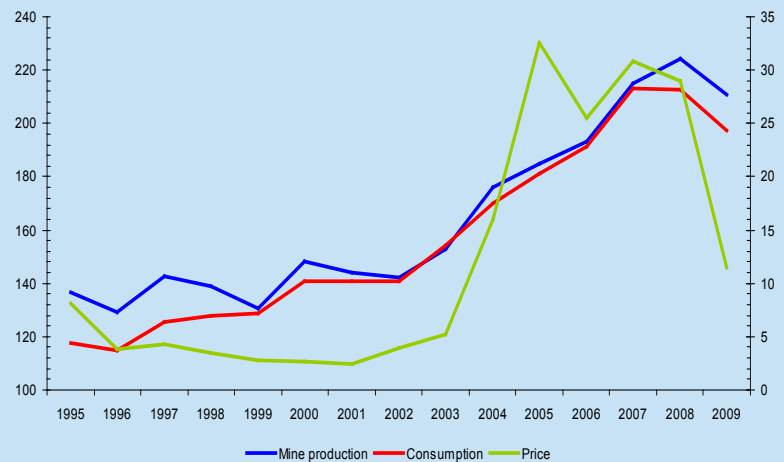
Between August 2008 and March 2009, molybdenum prices, responding to the global economic downturn, fell from US\$34/lbMo to US\$8/lbMo. This followed a four-year period when supply limitations and growing demand, principally from low alloy and stainless steels, sustained an average price of US\$30/lb.

Stockpiling of imported roasted concentrates by Chinese traders and consumers resulted in prices rallying for a while in mid 2009. Through 2010 and 2011, market volatility is likely to continue but thereafter consumer demand for molybdenum in steel for process and power plant, as well as in oil and gas projects, will keep the market tight.

The availability of project finance will remain a problem for potential new producers outside China. The consequent under-investment in molybdenum projects in 2009 and 2010 will have consequences for supply as far ahead as 2015.

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 production, consumption and prices of molybdenum, 1995-2008



### 1. SUMMARY

### 2. PROPERTIES, OCCURRENCE AND RESERVES OF MOLYBDENUM

### 3. MOLYBDENUM MINING AND PRODUCTION PROCESSES

### 4. WORLD MOLYBDENUM PRODUCTION DATA

### 5. CURRENT AND FORECAST MOLYBDENUM PRODUCTION CAPACITY

### 6. MOLYBDENUM PRODUCTION COSTS

### 7. NOTES ON MOLYBDENUM PRODUCING COUNTRIES

- Detailed analysis of 46 countries and over 100 companies

### 8. ANALYSIS OF MOLYBDENUM INTERNATIONAL TRADE DATA

- Raw molybdenum concentrates; roasted molybdenum concentrates; molybdenum oxides and hydroxides; ferromolybdenum; articles and powder of molybdenum metal; molybdenum waste and scrap

### 9. WORLD CONSUMPTION OF MOLYBDENUM

- Apparent consumption of molybdenum; consumption of molybdenum by use, industry, region, form

### 10. USES OF MOLYBDENUM

- Stainless and other alloy steels, catalysts, metal and alloys, grease, pigments

### 11. OUTLOOK FOR MOLYBDENUM CONSUMPTION BY PRODUCT

### 12. SUPPLY AND DEMAND OF MOLYBDENUM

### 13. MOLYBDENUM PRICES

- Comparison of contract and free market prices; historic trends in free market prices; concentrate prices; comparison of European and US prices; forecast for molybdenum prices

# How to order your report

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## Question?

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