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The Economics of Niobium

11th Edition, 2009

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Some highlights from the report

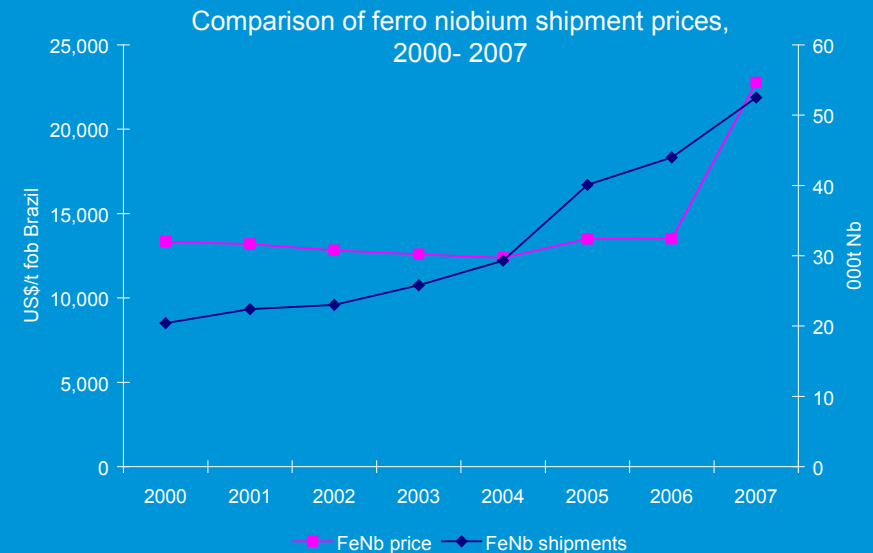
Growth in the global niobium market has been remarkable during the 2000s and was particularly strong from the middle of the decade. That growth came to an abrupt halt in 2008. In their core markets, such as HSLA steels for natural gas linepipe, the automotive sector and major construction, and in superalloys for the aerospace and power generation industries, niobium producers and processors saw past rates of increase in demand come to a stop during 2008, in common with most other industries. The first half of 2009 will probably prove to be no better. After that, demand for niobium will return to a healthy long-term growth trend. Market segments where niobium is well-established, and often has no substitutes, will continue to expand and new niches for niobium will continue to be developed.

Niobium is obtained from both pyrochlore and columbite-tantalite ores, but current production is dominated by three companies mining pyrochlore deposits, CBMM, Mineração Catalão de Goiás and Niobec. All three produce ferro-niobium, while CBMM also produces a range of other downstream products. Possible new sources of pyrochlore include Kanyika in Malawi and Sanguenay in Canada, while niobium production from columbite-tantalite ores at Ghurayyah in Saudi Arabia, Blue River in Canada and Abu Dabbab in Egypt could begin in 2010.

Niobium is used in a variety of forms, but by far the most important in tonnage terms is standard grade ferro-niobium, which has applications in HSLA and stainless steels. This market accounts for about 90% of niobium usage.

Historically, niobium prices have been very stable, but this changed in 2007, when prices for ferro-niobium began to climb very sharply. Average import prices in Japan increased from about US\$9,000/t gross weight in 2006 to over US\$22,000/t in 2008. It seems likely that the higher level of prices will be maintained once the effects of the global downturn have eased. In real terms, niobium prices had been falling for years at the same time that demand was increasing and costs were being incurred to boost capacity. Prices are likely to remain at the levels seen at the end of 2008 and will display relatively little volatility.

For the full list of contents, including 92 tables and 37 figures, please visit www.roskill.com/reports/niobium



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