

Silicon and Ferrosilicon: Global industry markets & outlook

ARE YOU FACING BIG DECISIONS INVOLVING SILICON AND FERROSILICON?

The market for silicon is global, and local events can make waves across the world. If you're involved with silicon 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
- Five year price forecasts

IS THIS REPORT FOR YOU?

Our clients include anyone with an interest in the evolving silicon 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

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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

- What is the growth rate for solar polysilicon production in China and elsewhere?
- How will solar use affect the overall market for silicon?
- What is the outlook for the use of silicon in aluminium alloys and silicone products?
- To what extent have Chinese exports of ferrosilicon declined?
- What is the outlook for ferrosilicon demand in steel?
- What is the outlook for prices of both silicon and ferrosilicon?

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 “Silicon and Ferrosilicon: 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 Silicon industry for over 40 years and this is our 13th report on this sector.

Approachable. Independent. Expert.

That's why no other report can match the accuracy, depth and expertise of “Silicon and Ferrosilicon: 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: 270 pages, 86 tables, 123 figures plus trade appendix

Overview

The major recent development in the silicon industry is the tripling of demand for solar grade polysilicon between 2008 and 2010, with the expectation that the quantity used in solar photovoltaic (PV) modules will start to rival that in the high volume silicon markets within a few years.

The main markets for silicon metal in 2010 were as an alloying element with aluminium (45%), in silicone and silane chemicals (35%) and in PV's (12%). The market for ferrosilicon is largely in steel (85%) and cast iron (15%), with very small amounts used in non-ferrous alloys.

Although demand for silicon and ferrosilicon is expected to remain robust

in the coming years, producers are likely to face challenging times due to overcapacity and rising production costs.

Silicon metal was produced in fifteen countries in 2010, with Chinese production accounting for about 46% of the world total. Global silicon capacity utilisation is less than 70%, mainly because of significant overcapacity in China. World ferrosilicon production capacity, nominally about 9.3Mtpy, is very fragmented, with some 80 companies in 27 countries outside China (where as many as 1,000 plants are said to exist) reporting capacities ranging from less than 1ktpy to over 500ktpy. Rising production costs due to increasing energy prices will see producers attempt to

raise market prices, and/or shut down uneconomic capacity.

Although supplied to very different markets, the prices of silicon and ferrosilicon follow very similar trends. European and US prices for silicon metal rose in the second half of 2010 through to March 2011 reaching US\$3,535/t and US\$3,616/t respectively, as a supply deficit continued to grow as demand increased. Over the coming years, prices are likely to continue to rise as both demand and production costs increase, which could take silicon prices to US\$4,000/t.

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 silicon and ferrosilicon production, 1990-2010



1. SUMMARY
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