



SUMMARY SLIDE DECK



INFORMED *Rendezvous*

Les Jardins du Marais, Paris

8-10 April 2019

The premier meeting place for the industrial minerals market

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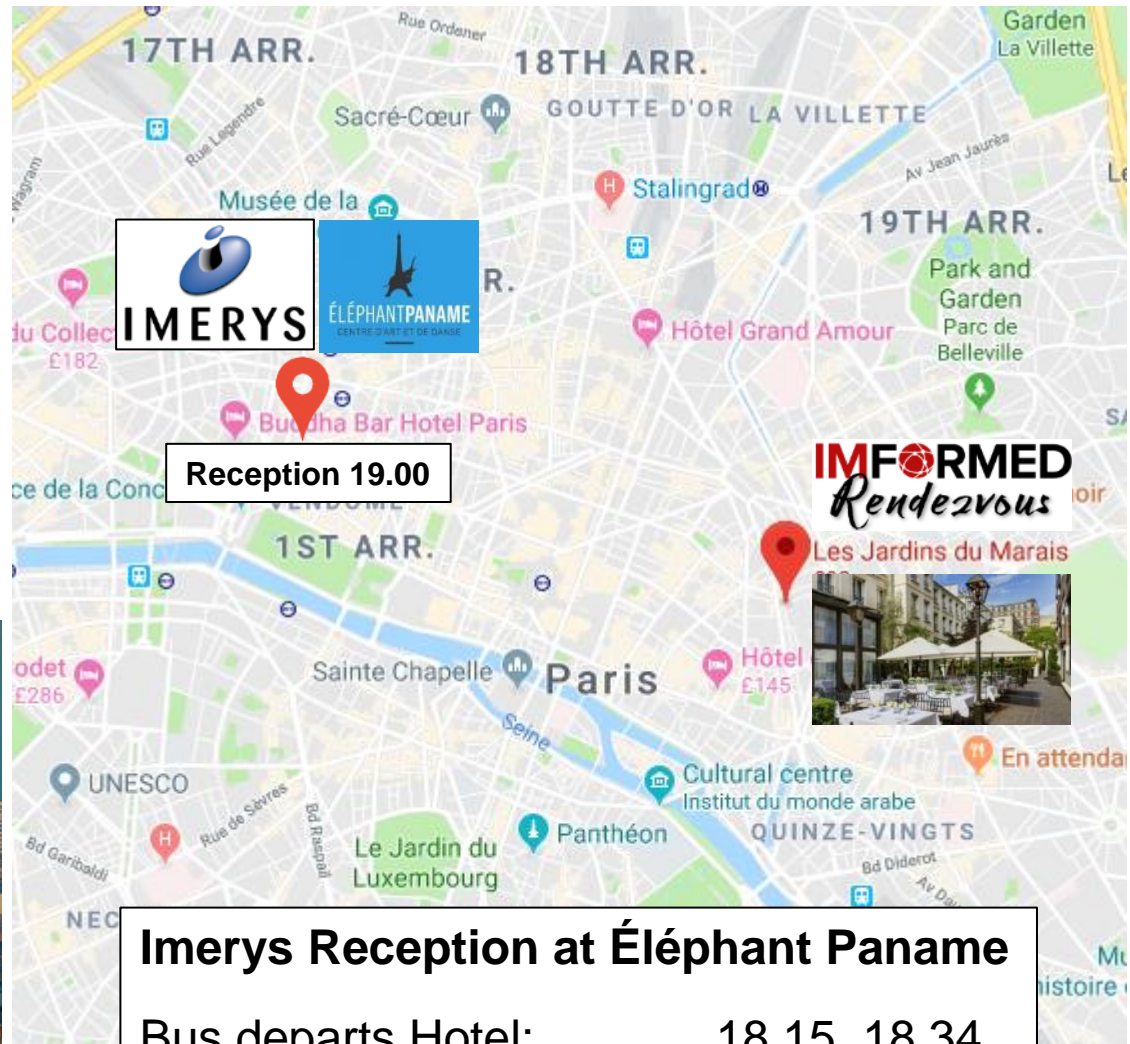


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Imerys Reception at Éléphant Paname

Bus departs Hotel:	18.15, 18.34
Bus departs Reception:	22.30

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IMFORMED *Rendezvous*

Why?



Industrial minerals: what's it all about?

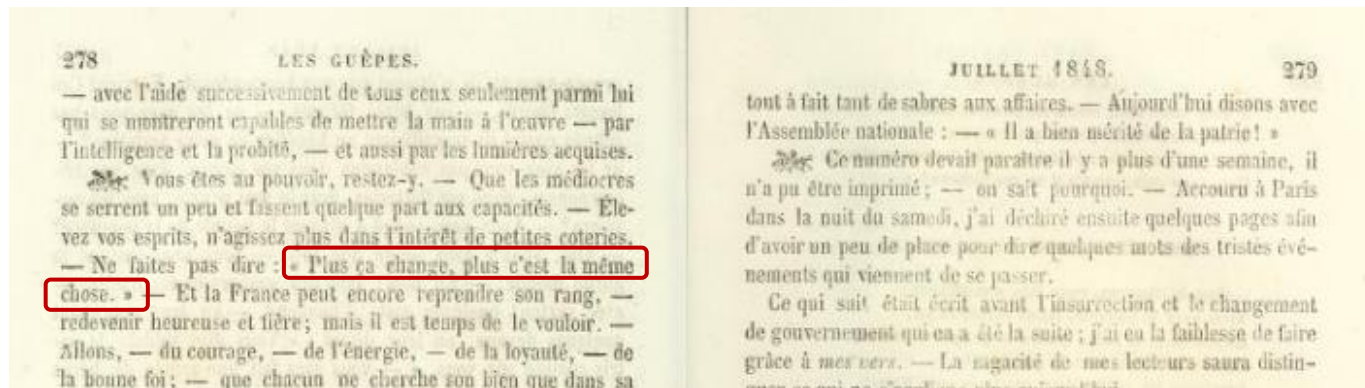


**Jean-Baptiste
Alphonse Karr
1808-1890**

Epigram written in
July 1848 issue
Les Guêpes
(*"The Wasps"*)

***"Plus ça change,
plus c'est la même chose"***

*"The more things change,
the more they stay the same"*



Industrial minerals: what's it all about?

“Without a market, an industrial mineral deposit is merely a geological curiosity”

Peter Harben, Industrial Minerals Consultant



Industrial minerals: what's it all about?

New generation markets: smart devices, new energy, plastics



Industrial minerals: what's it all about?

Future & Fundamentals

*"The more things **change**,the more they stay the **same**"*

IMFORMED
Rendezvous



Industrial minerals: what's it all about?

Strengthening Trends

1. **Critical and strategic minerals evolving to meet new demand**
2. **Chinese mineral supply reliance exposed**
3. **Recycling mind set steadily emerging**
4. **Processing and logistics innovations and developments paramount**



Industrial minerals: what's it all about?

- Major changes in corporate landscape



- Continuing interest of Private Equity groups



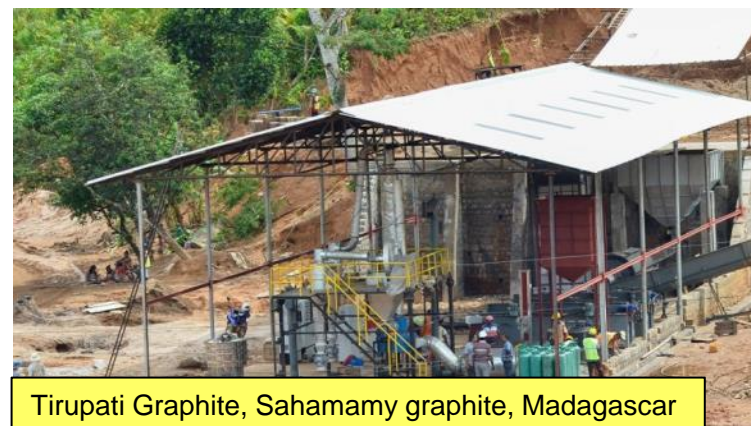
Industrial minerals: what's it all about?

- **Exciting new supply source developments**

➤ **“Established” markets:** fluorspar, magnesite, frac sand, anorthosite, bauxite

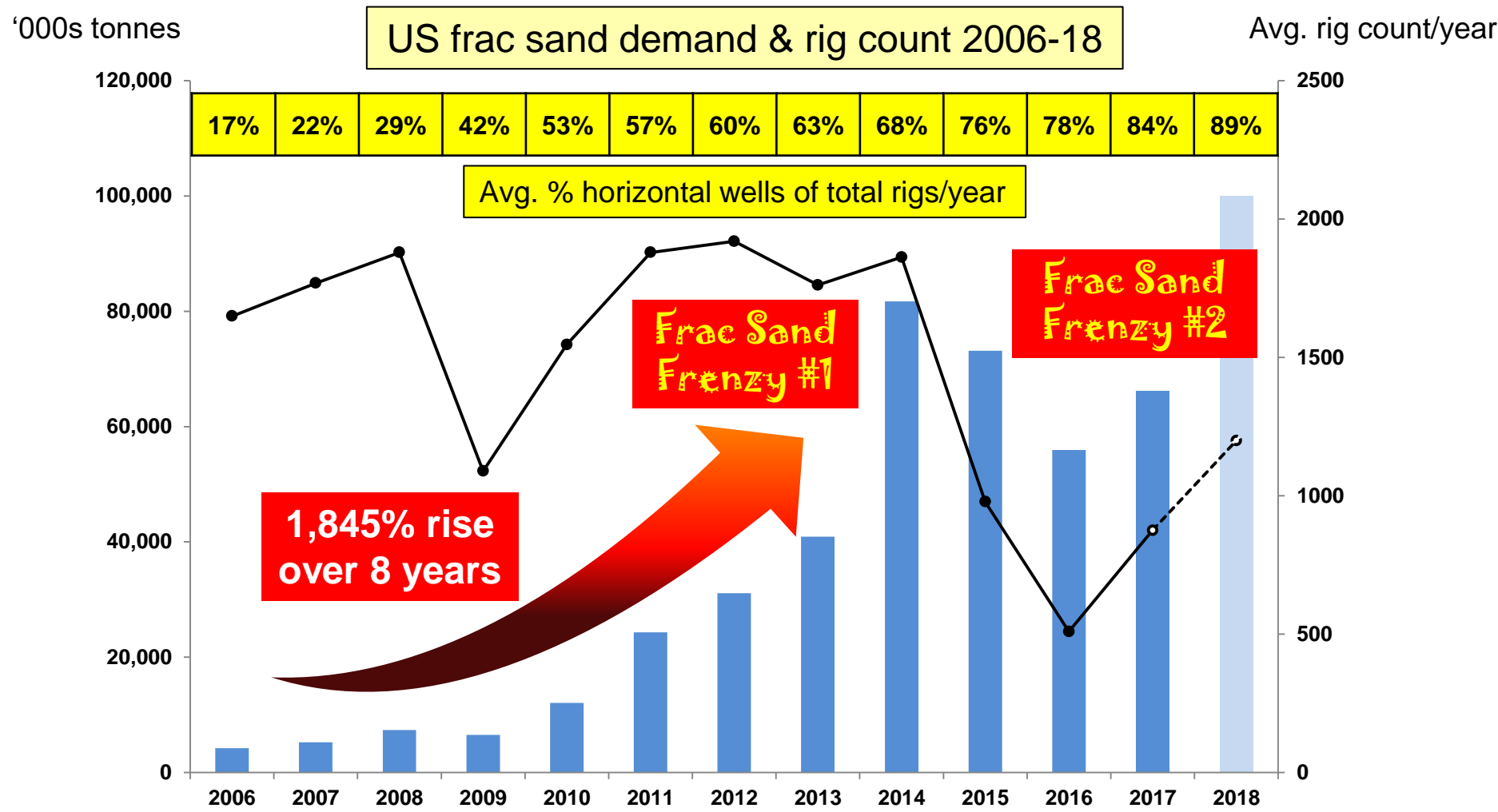


➤ **New markets:** lithium, graphite, HPQ, HPA



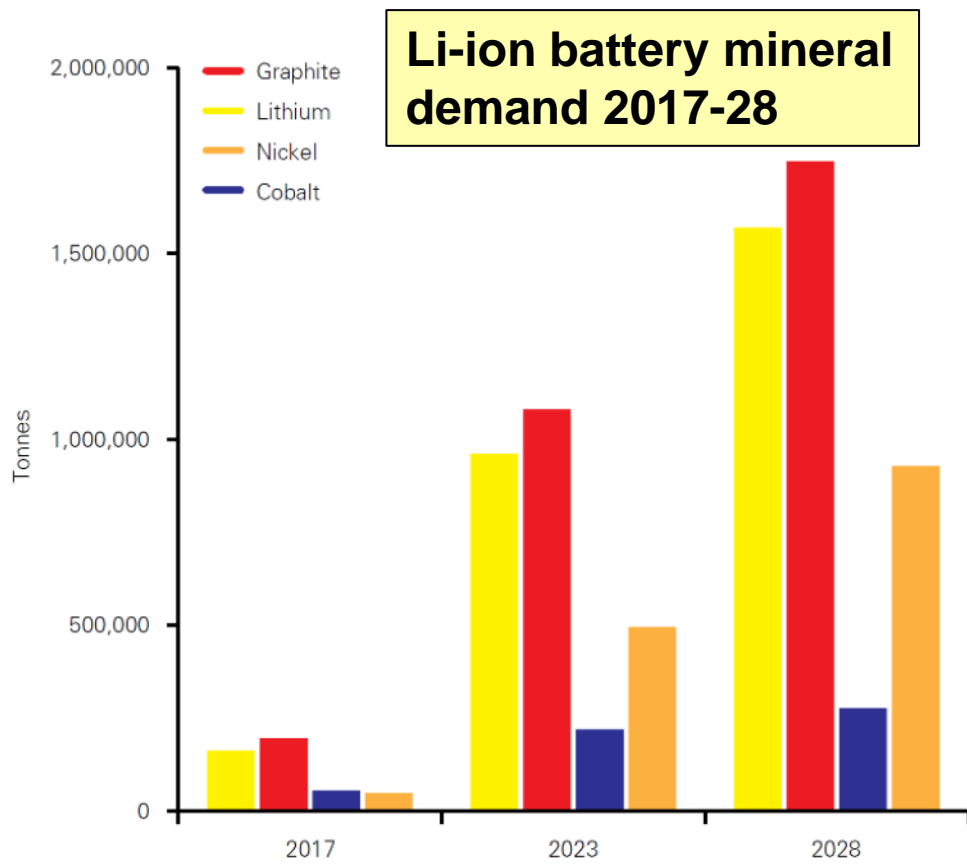
Industrial minerals: what's it all about?

- Knowing your market: anticipating the next growth trend



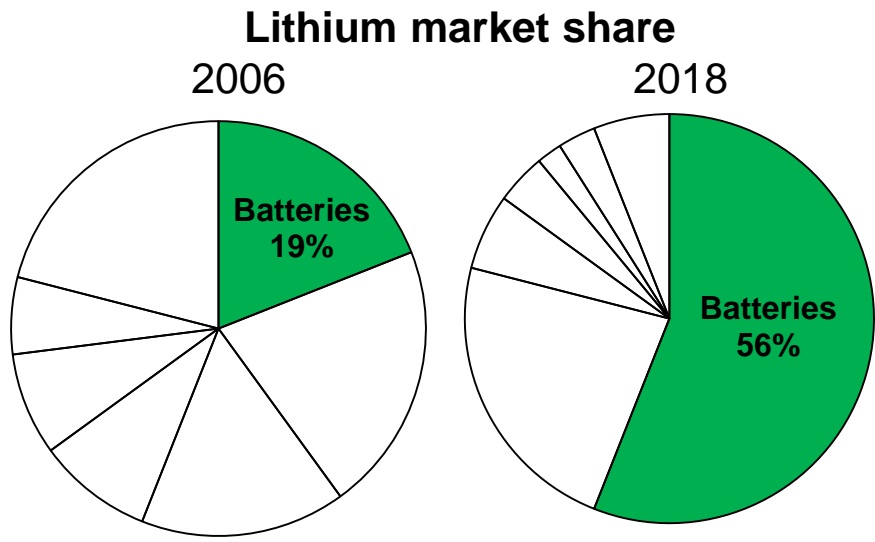
Industrial minerals: what's it all about?

- Knowing your market: anticipating the next growth trend



Source: Benchmark Mineral Intelligence

MATERIAL	2017	2023	2028
LITHIUM	162,752	961,351	1,570,020
GRAPHITE ANODE	194,160	1,080,360	1,747,800
COBALT	54,354	219,679	276,401
NICKEL	48,584	494,774	928,018



Source: USGS data

Programme – Tuesday Morning

KEYNOTES 1:

THE STATUS & FUTURE OF THE INDUSTRIAL MINERALS INDUSTRY

08.30 **Introduction**

Ismene Clarke, Director & Mike O'Driscoll, Director, IMFORMED, UK

08.45 **Mineral innovations for extreme environments**

Chris Parr, S&T Director Refractories, Abrasives & Construction, Imerys, France

09.15 **The consumer's viewpoint: taking innovation to 1,200°C and beyond**

Gustavo Franco, Chief Sales Officer, RHI Magnesita, Austria

09.45 **Trends, challenges, and issues for the industry**

Catherine Delfaux, President, IMA-Europe & Provençale SA, France

10.15 COFFEE



Programme – Tuesday Morning

KEYNOTES 2:

OUTLOOK FOR FINANCING, NEXT GENERATION MARKETS, PROCESSING

- 11.15 **The investment and financing climate in industrial minerals: challenges & opportunities – a private equity perspective**
Ryan Bennett, Partner, Senior Advisor, Resource Capital Funds, USA
- 11.45 **Critical, strategic and industrial – the minerals leading the next production revolution**
Dr Richard Flook, Managing Director, Mosman Resources Ltd, Australia
- 12.15 **Industrial mineral processing evolution and trends**
Dietmar Alber, Business Development Director, Minerals & Metals Division, Hosokawa Alpine AG, Germany

12.45 LUNCH *sponsored by*



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Programme – Tuesday Afternoon

14.30 OPTIONAL INFORMAL CONCURRENT ROUNDTABLES & BRIEFINGS SESSIONS

**Themed & Hosted
Roundtable Networking
*Antibes 1&2***

Financing/Investment

Ryan Bennett, Partner, Senior Advisor,
Resource Capital Funds, USA



Recycling

Dr Aurela Shtiza, Policy Director,
IMA-Europe, Belgium



China

Alison Saxby,
Director, Roskill Holdings, UK



Programme – Tuesday Afternoon

14.30 OPTIONAL INFORMAL CONCURRENT ROUNDTABLES & BRIEFINGS SESSIONS

14.30 Industrial mineral market basics: an executive primer

Mike O'Driscoll, Director, IMFORMED, UK

14.55 Industrial mineral resource exploration and evaluation

Anton Geldenhuys, Principal Resource
Consultant, CSA Global Pty Ltd, South
Africa

15.20 Reporting industrial mineral exploration results and resources according to the JORC Code

Dr Andrew Scogings, Executive
Consultant, Snowden, Australia

15.45 All you ever need to know about industrial mineral logistics

Clive Kessell, Director, Coastalwise, UK

16.10 Common Incoterms mistakes and the risks to a mineral purchase

John Newcaster, Director Southwest
Region, The Cumberland Group, USA

Basics Briefings

Biarritz Meeting Room

Programme – Tuesday Evening



Bus departs Hotel: 18.15 & 18.45
Bus departs Reception: 22.30

19.00 Reception
at Eléphant
Paname

sponsored by
Imerys

The Art & Dance Centre in the heart of Paris, a historical building from the time of Napoleon III offering a unique and warm ambiance, dedicated to emotion and beauty



Programme – Wednesday Morning

TRADING | LOGISTICS | PROCESSING

09.00 The evolving role of the industrial minerals trader for tomorrow's markets

Alex Aizpurua, Raw Materials Business Unit Director, Midegasa, Spain

09.30 Mineral logistics developments & innovations

Dave Chanet, Commercial Manager, Control Union, Belgium

10.00 Fine grinding & classifying: a new concept in mobility & modularity

Jean-François Maréchal, Managing Director, Poittemill, France

10.30 COFFEE

MINERAL MARKETS 1: REFRACTORIES | GLASS

11.30 Survival of the fittest: alumino-silicate minerals & their role in refractories

Phil Edwards, Refractory Market Manager, Refractories, Abrasives & Construction, Imerys, France

12.00 Glass mineral demand evolution and outlook

Tim Smith, Lead Technologist - Refractories, Raw Materials and Compositions, NSG Pilkington, UK

12.30 LUNCH



Programme – Wednesday Afternoon

MINERAL MARKETS 2: BATTERIES | PLASTICS | PAPER

- 14.00 **Battery evolution & supply chain – what does it mean for industrial minerals?**
Simon Moores, Managing Director, Benchmark Mineral Intelligence, UK
- 14.30 **Calcium carbonate fillers and the outlook for plastics and coatings markets**
Samantha Wietlisbach, Principal Analyst Chemicals, IHS Markit, Switzerland
- 15.00 **Mineral demand outlook for global paper & packaging markets**
Dr Ian Wilson, Consultant, UK

15.30 CLOSE OF CONFERENCE



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LKAB Minerals
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Traxys France





There is high demand for a forum such as this for both established participants and for newcomers to the industry covering both new and established minerals and markets.

Richard Flook, Mosman Resources, Australia

The content and scope of the presentations were excellent and I was able to make some good contacts.

Rory Allen, Managing Director, Anglo Pacific Minerals, UK

This conference was highly informative as well as important from the standpoint of networking with adjacent industry peers. We got some commercial leads, but more importantly we got some important market intelligence beyond our local markets.

Aditya Newalkar, Executive Director, Maharashtra Minerals Corp. Ltd, India

Excellent programme and organisation, perfectly balanced for a newcomer like myself learning about the business and meeting players.

Andre Tahon, Exploration Manager, Dal Mining Investment Co. Ltd, Sudan

Excellent programme for a new person in the procurement process of a consuming company. The Briefings on Basics flowed very well, excellent overviews of each step in the process.

Glenn McIntyre, Managed Fire Shape Technology, HarbisonWalker International, USA

Theme was excellent and well constructed. Very informative and engaging. Presentations were excellent, extremely topical and thought provoking.

Mick, Commercial Director, LKAB Minerals, UK



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Industrial Mineral Forums & Research

Networking and knowledge for the industrial minerals business



 imformed.com



- Launched in January 2015
- Extensive experience & reputation
- Specialising in conferences & market research in:
 - Magnesia
 - Refractory Minerals
 - China
 - Mineral Recycling
 - Fluorine
 - India
 - Oilfield Minerals



MAGFORUM 2019 
Magnesium Minerals & Markets Conference
Occidental Bilbao, 13-15 May 2019

**OILFIELD MINERALS & MARKETS
FORUM HOUSTON 2019** 
Hilton Houston Post Oak, Houston, 10-12 June 2019

FLUORINE FORUM 2019
Alcron Hotel, Prague
21-23 October 2019 

**INDIAN MINERALS &
MARKETS FORUM 2019**
JW Marriott Mumbai Juhu,
18-20 November 2019
(Field Trip 21-22 November 2019) 

Sponsorship & Exhibit Opportunities



MINERAL
MARKET
MATRIX

AT A GLANCE
A-Z GUIDE
WHICH MINERALS
FOR WHICH
MARKETS

MINERAL "Derivative" "Synthetic"	MARKETS*																				MINERAL "Derivative" "Synthetic"
	Alumina	Alumina	Alumina	Alumina	Alumina	Alumina	Alumina	Alumina	Alumina	Alumina	Alumina	Alumina	Alumina	Alumina	Alumina	Alumina	Alumina	Alumina	Alumina	Alumina	
ALUMINA																					ALUMINA
ANDALUSITE																					ANDALUSITE
ANTIMONY TRIOXIDE																					ANTIMONY TRIOXIDE
ASBESTOS																					ASBESTOS
ATTAPULGITE																					ATTAPULGITE
BADDELEYITE																					BADDELEYITE
BARITE (BARYTE)																					BARITE (BARYTE)
BAUXITE																					BAUXITE
BENTONITE																					BENTONITE
BORAX																					BORAX
BROMINE																					BROMINE
CALCIUM CARBONATE																					CALCIUM CARBONATE
CELESTINE																					CELESTINE
CHROMITE																					CHROMITE
DIAMOND (INDUSTRIAL)																					DIAMOND (INDUSTRIAL)
DIATOMITE																					DIATOMITE
DOLomite																					DOLomite
FELDSPAR																					FELDSPAR
FLUORSPAR																					FLUORSPAR
GARNET																					GARNET
GRAPHITE																					GRAPHITE
GYPsUM																					GYPsUM
HEMITE																					HEMITE
IODINE																					IODINE
IRON OXIDE																					IRON OXIDE
KALIN																					KALIN
KYANITE																					KYANITE
LIME																					LIME
LITHIUM																					LITHIUM
MAGNESITE																					MAGNESITE
MANGANESE																					MANGANESE
MICA																					MICA
NEPHELINE SYENITE																					NEPHELINE SYENITE
NITRATES																					NITRATES
OLIVINE																					OLIVINE
PERILITE																					PERILITE
PHOSPHATE																					PHOSPHATE
POTASH																					POTASH
PUMICE																					PUMICE
PYROPHYLITE																					PYROPHYLITE
QUARTZ																					QUARTZ
RARE EARTHS																					RARE EARTHS
RUTILE																					RUTILE
SALT																					SALT
SEPOLITE																					SEPOLITE
SILICA SAND																					SILICA SAND
SILICON CARBIDE**																					SILICON CARBIDE**
SILLIMANITE																					SILLIMANITE
SPINEL*																					SPINEL*
SODA ASH																					SODA ASH
SODA ASH*																					SODA ASH*
SODIUM SULPHATE																					SODIUM SULPHATE
SULPHUR																					SULPHUR
TALC																					TALC
VERMICULITE																					VERMICULITE
WOLLASTONITE																					WOLLASTONITE
ZEOCLITE*																					ZEOCLITE*
ZIRCON																					ZIRCON
ZIRCONIA*																					ZIRCONIA*

- Leading industrial minerals
- Main raw material feedstock
- Key specified chemical component
- World production
- Main source countries
- Leading consuming markets

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**REFRACTORY
RAW MATERIAL
WORLD SOURCES**

**PRIMARY WORLD SOURCES & PRODUCTION CAPACITY OF
KEY REFRACTORY MINERALS**

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- KEY** - see notes below
- ALUMINA
 - FUSED ALUMINA
 - ANDALUSITE
 - BAUXITE
 - CHROMITE
 - GRAPHITE
 - DEAD BURNED MAGNESIA
 - FUSED MAGNESIA
 - SILICON CARBIDE
 - ZIRCON

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**REFRACTORY
RAW MATERIAL
WORLD SOURCES**

EXCELLENCE IN REFRACTORIES RHI

WORLD MAP
A world map showing the primary world sources and production capacity of key refractory minerals. The map is color-coded by region: North America (yellow), South America (orange), Europe (green), Africa (blue), Asia (red), and Australia (purple). Each region is linked to a table of data for various minerals, including Alumina, Fused Alumina, Andalusite, Bauxite, Chromite, Graphite, Dead Burned Magnesia, Fused Magnesia, Silicon Carbide, and Zircon. The tables provide details on production capacity, reserves, and key producers. A central pie chart shows the global distribution of these minerals.

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IMERYS REFRACTORY MINERALS
ALUMINA, ANDALUSITE, MULLITE
The most advanced materials for high performance refractories

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Dead Burned Magnesia perfectly produced in the Netherlands

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MAGNESIA

WORLD SOURCES MAP


PRIMARY WORLD SOURCES AND PRODUCTION CAPACITY OF KEY MAGNESIA RAW MATERIALS




Magnesite




Caustic Calcined Magnesia




Dead Burned Magnesia




Fused Magnesia




Magnesium Hydroxide




Brucite




Huntite




Dunite



Olivine




Kieserite



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Les Jardins du Marais, Paris
8-10 April 2019

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