

FLUORINE FORUM 2019

Alcron Hotel, Prague
21-23 October 2019



The new meeting place for the global fluorine minerals and markets business



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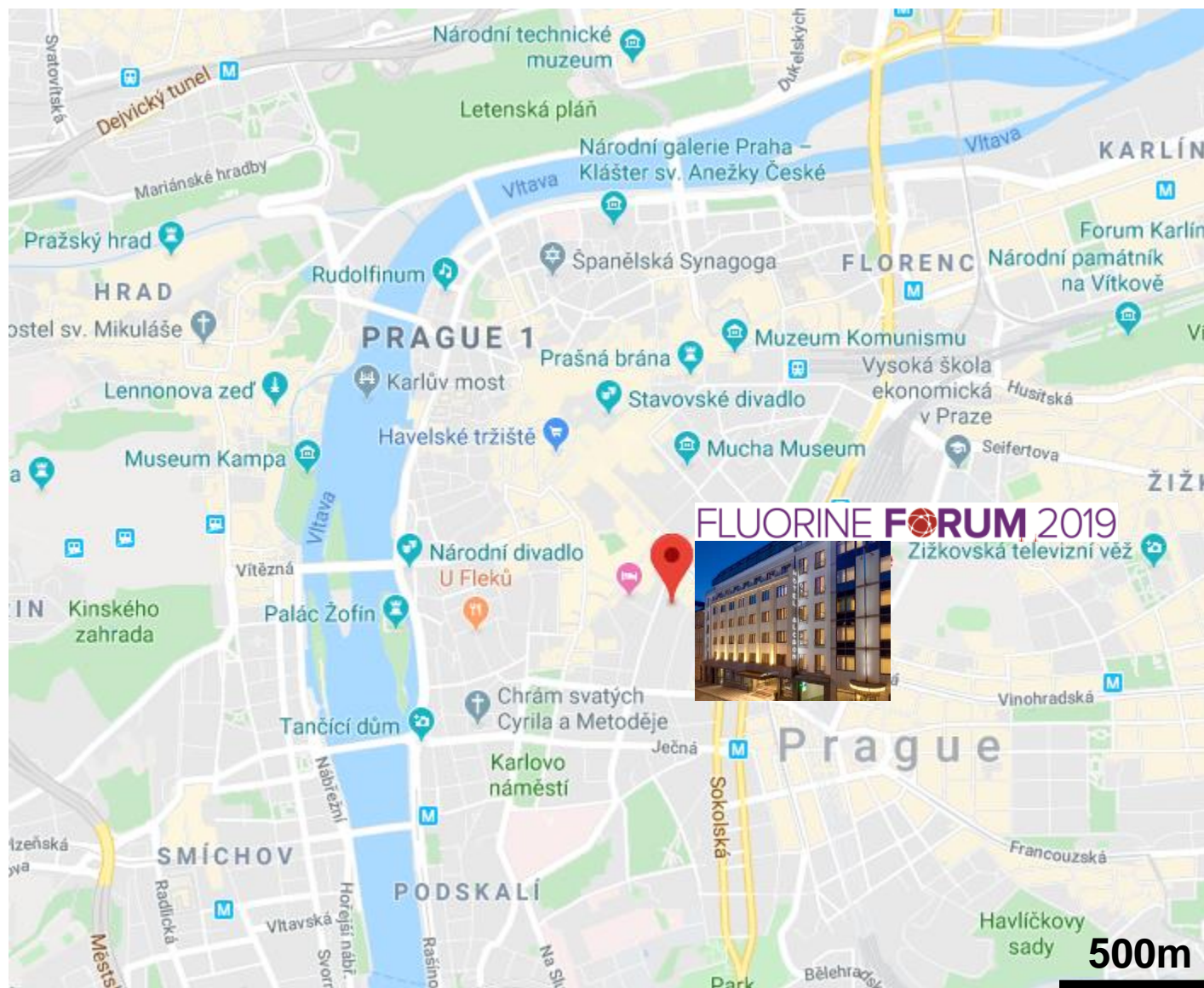
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Welcome to Prague



Welcome to Prague





Welcome Reception





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Traxys Europe
Vergenoeg Mining Co.
Xenops Chemicals GmbH & Co KG





Thank you for a great conference. Excellent speakers and attendee list.

Bill Dobbs, Chief Executive Officer, Canada Fluorspar (NL) Inc., Canada

Well thought discussions and presentations, roundtables gave an opportunity to interact.

Haridas Sreedharan, President Supply Chain, Navin Fluorine Intl. Ltd, India

Well-rounded programme, well put together, good venue and attendance.

Malcolm Crawford, Delta Minerals Ltd, UK

Excellent programme and venue, perfect exchange between participants.

Erika Utner, Commercial Manager, CHENCO, Germany

Knowing the market, knowing most of the market participants, makes these conference organisers the best in the business.

Ray Will, Director of Specialty & Inorganic Chemicals, I H S Markit, USA

Thank you for providing a very well organised event and the opportunity to present to my peers and leaders in the fluorine industry.

John Zielinski, Category Manager Fluoroproducts, The Chemours Co., USA

Congratulations, you really knocked it out of the park with the content of the conference.

Kerry Satterthwaite, Manager Industrial Minerals & Chemicals, Roskill, UK

Thank you and your team for a beautifully organised conference. I participated in it for the first time and I'm sure that it will not be the last time

Evgeniy Torochkov, Head of Dept., PhosAgro JSC "NIUIF", Russia

Very good quality of presentations, keep it at this level. Roundtables excellent.

Andreas Waser, Managing Director, Additive Solutions Ltd, Switzerland



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Setting the Scene

Key Discussion Points



FLUORINE FORUM 2019 Why Prague?

Czech fluorspar deposits

- Hydrothermal; mostly located in marginal parts of the Bohemian Massif, associated with major fault zones of the Krušné hory Mts.
- 1991 32,000t peak, declined to 10,000t in 1994
- Mine & imports processing at Sobědruhy, Teplice
- No mine production since 1994, limited trade

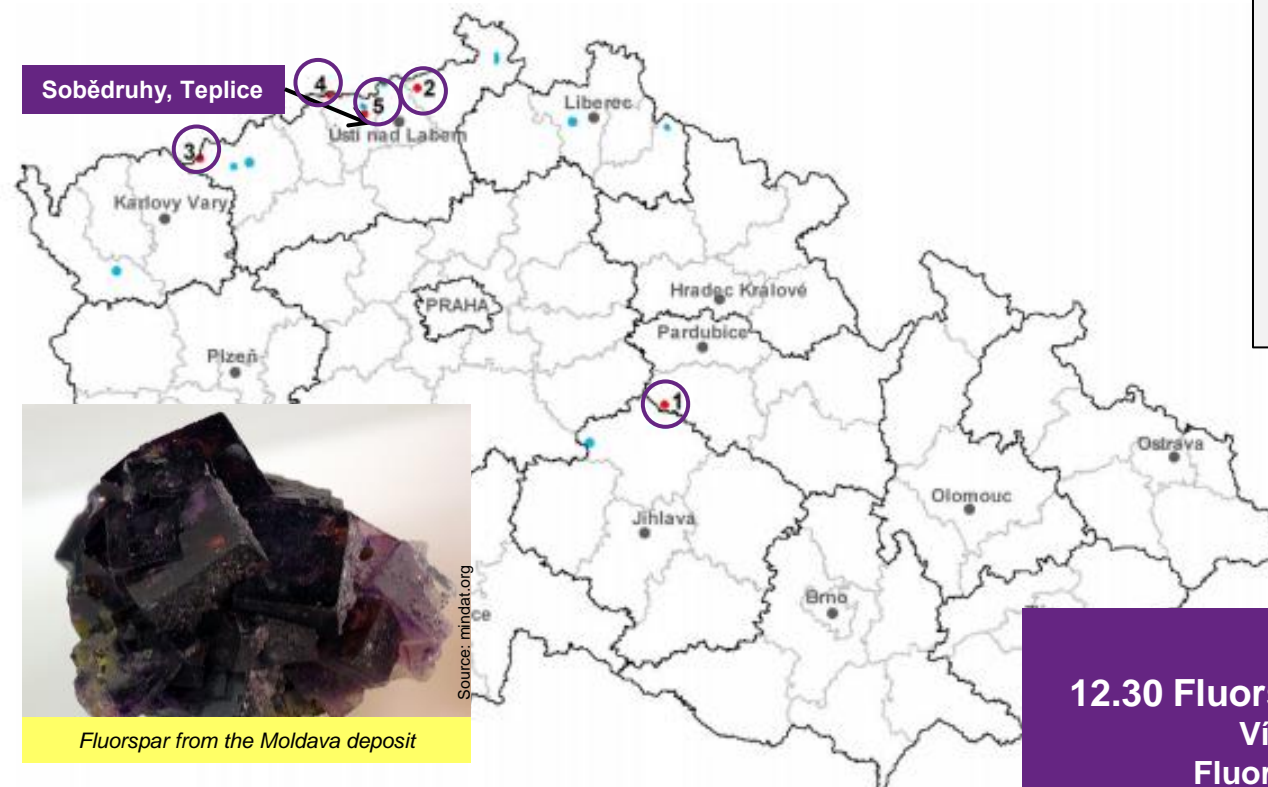
Registered deposits & other resources (year mining operations ended):

- Běstvína (1994)
- Jílové u Děčína (1994)
- Kovářská
- Moldava (1994)
- Proboštov - tailings pond Přítko

Mineral reserves (tonnes):

Total:	2,210,000
Economic prospected:	32,000
Potential economic:	2,178,000

Sobědruhy, Teplice



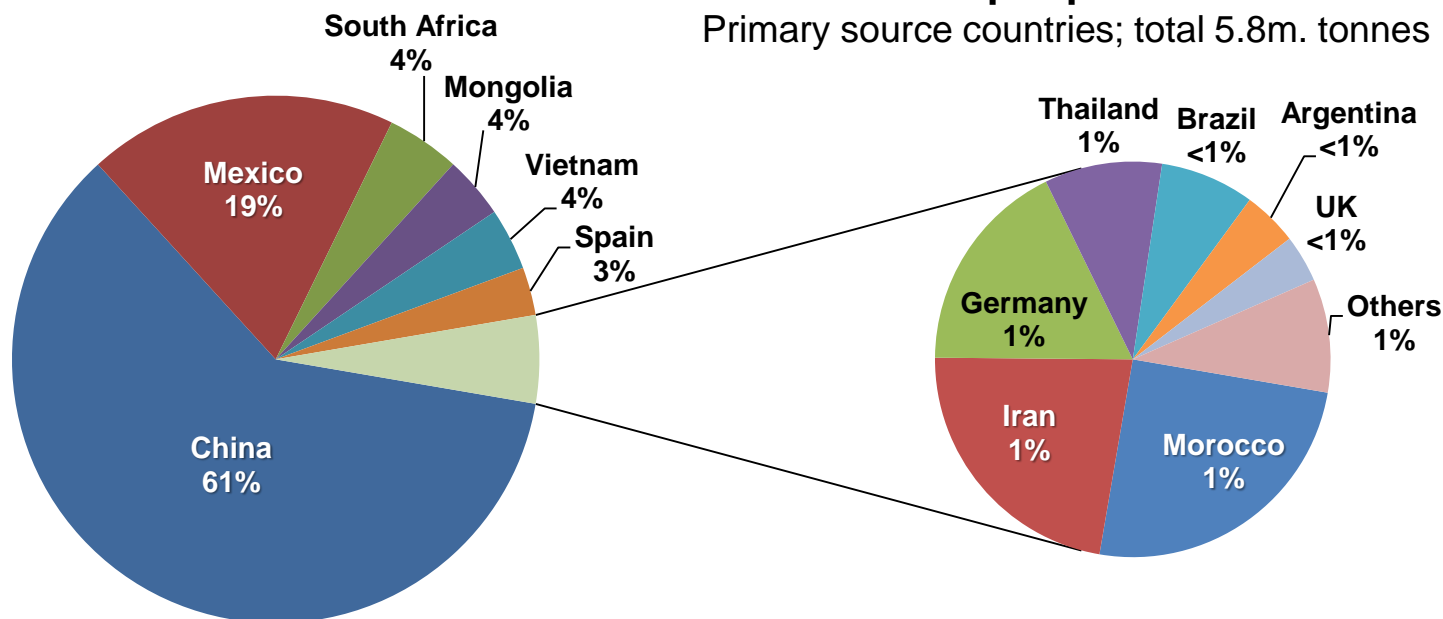
Fluorspar from the Moldava deposit



Presenting Today
12.30 Fluorspar mining in the Czech Republic
Vít Kučera, Managing Director,
Fluorit Teplice s.r.o., Czech Republic

Supply trends – overall

World fluorspar production 2018
Primary source countries; total 5.8m. tonnes



- 2018 reasonably tight, mainly owing to mine closures from environmental controls in China, and limited production from new and emerging producers in Canada and Asia.
- Looks set to continue through 2019 and even 2020 unless new capacity in South Africa and Canada starts to materialise.
- China remains world's top fluorspar producer, accounting for around 60% of total world output of 5.8m tonnes in 2018, followed by Mexico, 19%
- There has been some recent production emerging from Pakistan, Thailand, and Myanmar; new production is expected from Canada and South Africa

Source: data from USGS



Key discussion points

- **Supply**

- When/where are new supply sources emerging? Can they be absorbed? Will there be enough for market demand? Will prices stay firm?
- China: what's really occurring? Changing world role, metspar imports, downstream markets, impact of latest round of environmental inspections?
- Mongolia: are there real prospects? Trade via China and then exported as acidspar?

- **Processing**

- Cost factors and controls
- FSA latest developments?

- **Markets**

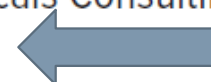
- Is it possible to accurately measure global fluorspar consumption?
- Steel and aluminium demand drivers facing recession?
- Fluorochemicals: HFC phase out & replacements, illegal HFC trade, changes in cooling market, new hi-tec applications, eg. Li-/F-ion batteries
- Use of <97% CaF₂ for HF, a growing trend? Assess a change in CaF₂ grade designation?
- US trade war impact?



Programme – Tuesday Morning

OVERVIEWS

- 09.00 **Introduction**
Ismene Clarke, Director & Mike O'Driscoll, Director, INFORMED, UK
- 09.30 **Key trends and outlook for the fluorspar market**
Oliver Rhode, CEO, Xenops Chemicals GmbH & Co. KG, Germany
- 10.00 **Trade & tariffs: Where we've been and where we might go**
Ray Will, Director of Specialty & Inorganic Chemicals Consulting, IHS Markit, USA



Mentimeter

10.30 COFFEE

MINING & PROCESSING

- 11.30 **Cost factor trends in fluorspar processing**
Ashok Shinh, Ashok Shinh Consultancy Ltd, UK
- 12.00 **Fluorspar mining in Europe: mineral waste (tailings) management in a National Parks**
Peter Robinson, Chairman, British Fluorspar UK Ltd, UK
- 12.30 **Fluorspar mining in the Czech Republic**
Vít Kučera, Managing Director, Fluorit Teplice s.r.o., Czech Republic

13.00 LUNCH



Programme – Tuesday Afternoon

SUPPLY: VIETNAM | CHINA

14.30 **Nui Phao: Striving to be the best-in-class supplier**

Tony Fitzgerald, former Director Sales & Marketing, Masan Resources Group, Vietnam

15.00 **The development of China's fluorspar industry**

Usman Khan, CEO, Kcomber Inc., China

15.30 **China's fluorspar market update**

Liao Xinhua, Chairman, China Non-metallic Minerals Industry Association Fluorspar Committee, China

16:00 COFFEE & ROUNDTABLE NETWORKING

Table No.	Theme	Table Host
1.	China	Usman Khan, CEO, Kcomber Inc., China
2.	New/Alt. Sources/Projects	Peter Robinson, Chairman, British Fluorspar, UK
3.	Processing cost factors	Ashok Shinh, Ashok Shinh Consultancy Ltd, UK
4.	Aluminium fluoride	Adam Coggins, Analyst, Roskill, UK
5.	Fluorochemicals	Samantha Wietlisbach, Analyst, IHS Markit

17.30 EVENING RECEPTION



Programme – Wednesday Morning

MARKETS 1: REFRIGERANTS

09.00 **The evolution of refrigerant gas and the role of Chemours in the market**

John Zielinski, Executive Buyer Fluoroproducts, Chemours, USA

09.30 **Changes in refrigerant use and its impact on the air conditioning and refrigeration markets**

Andrea Voigt, Director General, European Partnership for Energy & the Environment, Belgium

10.00 COFFEE

MARKETS 2: HF & FSA DEVELOPMENTS

11.00 **HF and fluorine developments in Saxony and eastern Europe**

Johannes Scheruhn, General Manager, Scheruhn Minerals and Chemicals GmbHs

11.30 **HF from Fluorosilicic Acid (FSA): challenges and opportunities**

Datta Umalkar, Technical Consultant, Chenco GmbH, Germany

12.00 **A new proven technology to recover Anhydrous HF from FSA**

Bob Welch, Sales Director, New Chemical Products LLC, USA

12.30 LUNCH



Programme – Wednesday Afternoon

MARKETS 3: FLUOROCHEMICALS | ALUMINIUM FLUORIDE

- 14.00 **India: An emerging market for acid grade fluorspar**
Bimlesh Jain, Executive President (Corporate), Gujarat
Fluorochemicals Ltd, India
- 14.30 **Downstream markets for fluorochemicals, through to
fluoropolymers and fluoroelastomers**
Samantha Wietlisbach, Principal Analyst, Chemical, IHS Markit,
Switzerland
- 15.00 **Trends in aluminium fluoride supply and demand**
Adam Coggins, Analyst, Roskill, UK

15.30 CLOSE OF CONFERENCE



Chairpersons & IMFORMED staff



Mike O'Driscoll
Director & Chairperson



Gerry Clarke
Consultant & Chairperson



Ismene Clarke
Director



Maria Bernard
Sales Manager



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- *A fresh, alternative initiative to bring together the fluorine community, with...*
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FLUORINE FORUM 2017

San Luis Potosí, Mexico
30 Oct-2 Nov 2017



FLUORINE FORUM 2018

Hotel Wellington, Madrid
15-17 October 2018



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Alcron Hotel, Prague
21-23 October 2019



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Pan Pacific Hanoi

12-14 October 2020



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 - Fluorine
 - Oilfield Minerals





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	Alumina	Alumina	Alumina	
ALUMINA																										ALUMINA
ANDALUSITE																										ANDALUSITE
ANTIMONY TRIOXIDE																										ANTIMONY TRIOXIDE
ASBESTOS																										ASBESTOS
ATTAPULGITE																										ATTAPULGITE
BADDELEYITE																										BADDELEYITE
BARITE (BARIUM)																										BARITE (BARIUM)
BAUXITE																										BAUXITE
BENTONITE																										BENTONITE
BORON																										BORON
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
HEMIMORPHITE																										HEMIMORPHITE
IODINE																										IODINE
IRON OXIDE																										IRON OXIDE
KALIN																										KALIN
KYANITE																										KYANITE
LIME																										LIME
LITHIUM																										LITHIUM
MAGNESITE																										MAGNESITE
MANGANESE																										MANGANESE
MICA																										MICA
NATROLITE																										NATROLITE
NEPHELINE SYENITE																										NEPHELINE SYENITE
NITRATES																										NITRATES
OLIVINE																										OLIVINE
PERILLITE																										PERILLITE
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
ZINCITE*																										ZINCITE*
ZIRCON																										ZIRCON
ZIRCONIUM																										ZIRCONIUM

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

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MINERAL RECYCLING **FORUM** 2020



Pullman Hotel Aachen Quellenhof, 10-11 March 2020

Secondary raw material sources, supply,
processing, and markets

MAG**FORUM** 2020



Magnesium Minerals & Markets Conference

Grand Hotel Huis ter Duin (Noordwijk),
Amsterdam — 27-29 May 2020

IM**FORMED** *Rendezvous*

Grand Hotel Huis ter Duin (Noordwijk),
Amsterdam, 6-8 April 2020

SUPPLY PROCESSING LOGISTICS MARKETS

OILFIELD MINERALS & MARKETS **FORUM** HOUSTON 2020



Hilton Houston Post Oak, Hilton, 8-10 June 2020

CHINA REFRACTORY MINERALS **FORUM** 2020



Dalian, September 2020

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