

REFRACTORY MINERALS **FORUM** 2021

SUMMARY SLIDE DECK

16-17 March 2021

ONLINE



Global supply and demand trends for refractory minerals

Sponsor
**Imerys Refractories,
Abrasives & Construction**



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IMERYS

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PROGRAMME*

DAY 1

Tues 16 March

All times shown are GMT
(corresponding time zones shown)

* All timings approximate; subject to change

GMT	CET+1	EDT-5	SGT+8	
11.00	12.00	06.00	19.00	Welcome & Introduction Ismene Clarke, Director & Mike O'Driscoll, IMFORMED, UK
11.30	12.30	06.30	19.30	Refractory futures: the Circular Economy, climate change & its effect on refractory mineral markets Dr Richard Flook, Managing Director, Mosman Resources, Australia
12.00	13.00	07.00	20.00	Latest supply trends for Chinese refractory minerals Vincent Wong, Market Analyst, Refractories Window, China
12.30	13.30	07.30	20.30	India's response to refractory raw material supply & demand Sameer Nagpal, CEO, Dalmia-OCL, India
13.00	14.00	08.00	21.00	BREAK
13.15	14.15	08.15	21.15	Overview of dolomite activities within RHI Magnesita Thomas Frömmer, Senior VP Mining, RHI Magnesita, Austria
13.45	14.45	08.45	21.45	Magnesia review Mike O'Driscoll, Director, IMFORMED, UK
14.15	15.15	09.15	22.15	A Year in Transition: 2021 Global Refractories Outlook Carol Jackson, President, World Refractories Association & CEO, HarbisonWalker International, USA
14.45	15.45	09.45	22.45	ROUNDTABLE BREAKOUT SESSION <i>Informal Networking</i> 1. Magnesia host Mike O'Driscoll 2. Refractories Market Daniela Vigilante

USE LINK 1

USE LINK 2

PROGRAMME*

DAY 2

Wed 17 March

All times shown are GMT

(corresponding time zones shown)

* All timings approximate; subject to change

GMT	CET+1	EDT-5	SGT+8	
12.00	13.00	07.00	20.00	Welcome & Introduction Ismene Clarke, Director & Mike O'Driscoll, IMFORMED, UK
12.15	13.15	07.15	20.15	Evolution of raw material selection for refractory applications Phil Edwards, Marketing Director - Refractory Producers, & Chris Parr, VP Science & Technology, Imerys Refractories, Abrasives and Construction, France
12.45	13.45	07.45	20.45	Refractory bauxite trends Ted Dickson, TAK Industrial Mineral Consultancy, UK
13.15	14.15	08.15	21.15	Update on First Bauxite's high grade bauxite supply from Guyana John Karson, VP Sales and Marketing, First Bauxite LLC, USA
13.45	14.45	08.45	21.45	BREAK
14.00	15.00	09.00	22.00	Andalusite supply outlook Dirk Auge, Sales Manager, Cofermin Rohstoffe GmbH & Co. KG, Germany
14.30	15.30	09.30	22.30	The graphite supply chain: a strategic review George Miller, Analyst, Benchmark Mineral Intelligence, UK
15.00	16.00	10.00	23.00	Speciality grade chromite: the trends & impacts from mainstream ferrochrome demand Dr Nils Backeberg, Manager Steel Alloys, Roskill, UK
15.30	16.30	10.30	23.30	ROUNDTABLE BREAKOUT SESSION <i>Informal Networking</i> 1. Aluminosilicates 2. Graphite/Chromite

USE LINK 3

USE LINK 4



Almatiss
 Andalucita
 ARCIRESA
 Bal-Co SpA
 Baymag Inc
 Benchmark Mineral Intelligence
 Cemmet LLC
 Cofermin Rohstoffe GmbH & Co. KG
 Dalmia OCL Ltd
 Deutsche Edelstahlwerke Services
 GmbH
 DSF Refractories & Minerals Ltd
 EK-Company AG
 EuroChem
 First Bauxite LLC
 Ganmag Magnesite Solutions
 Gouda Refractories

HarbisonWalker International
 Höganäs Borgestad AB
 IMCD
 Imerys Refractories Abrasives
 & Construction
 Industrial Sources Minerals
 JSW Steel Ltd
 Korea Materials
 Lhoist North America Inc
 Lincoln Electric Company
 Maharashtra Minerals Corp Ltd
 Mayerton Refractories
 Meladore Ltd
 Midegasa
 Mineralen Kollee
 Minerals GmbH & Co.KG
 Mosman Resources

Possehl Erzkontor GmbH & Co KG
 Refractories Window
 Refractories WorldForum
 Refratechnik Holding GmbH
 RHI Magnesita
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 Saint-Gobain
 SCR-Sibelco
 SSAB
 TAK Industiral Mineral Consultancy
 Thyme Hong Kong Co Ltd
 USGS
 University of Koblenz-Landau
 Vesuvius
 Wuhan University of Science &
 Technology
 ZM Ropczyce S.A



“I got a lot out of it. I found it very informative and a number of the presentations were directly relevant to my role”

Paul Wain, Purchasing Manager, DSF Refractories & Minerals Ltd, UK

“It was a great experience to connect with all the global experts and have insightful discussions on refractory raw material and the recycling business”

Avinash Nigam, Corporate Commercial, JSW Steel Ltd

“Great event... great content! My folks who attended had rave reviews”

Carol R. Jackson, Chairman and CEO, HarbisonWalker International

“Very good meeting, very good presentations, I liked also the breakout. Congrats also to the organisation.”

Thomas Frömmer, Senior Vice President Mining, RHI Magnesita, Austria

“Thanks to IMFORMED for another excellent and professionally run event, giving the global refractory community an opportunity to come together when we need it most”

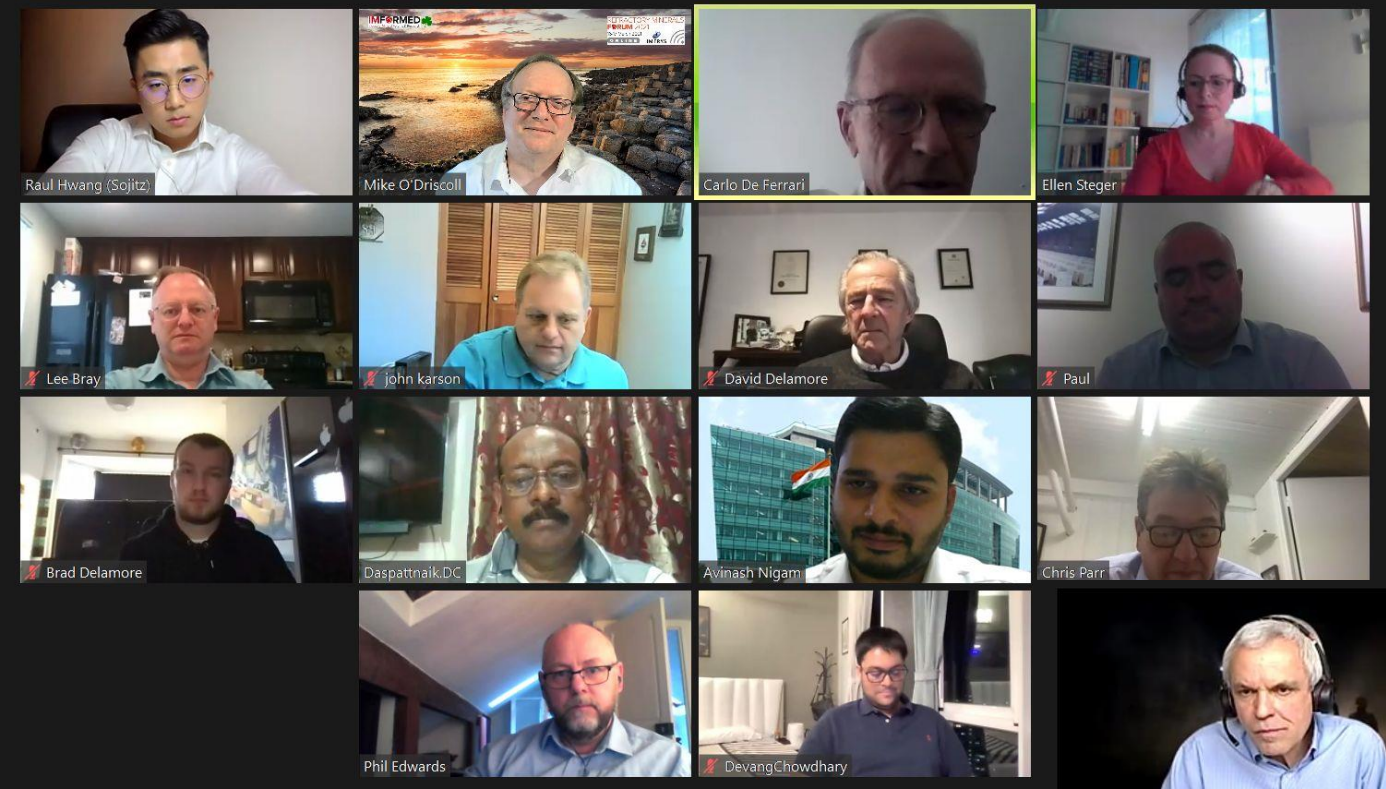
Phil Edwards, Marketing Director – Refractory Producers, Imerys Refractories, Abrasives, Constructions, France

“Thanks very much for a great forum event. Really impressed how good this was considering we are all limited in our efforts online - so great work in putting it together”

Suzanne Shaw, Deputy Manager Strategic Minerals, Roskill, UK

“The selection of speakers and their presentation was outstanding”

Jenny Warburton, General Manager, China & Global Materials, HarbisonWalker International, China



Refractory minerals overview



“There would be no life without refractories, and without raw materials there would be no refractories.

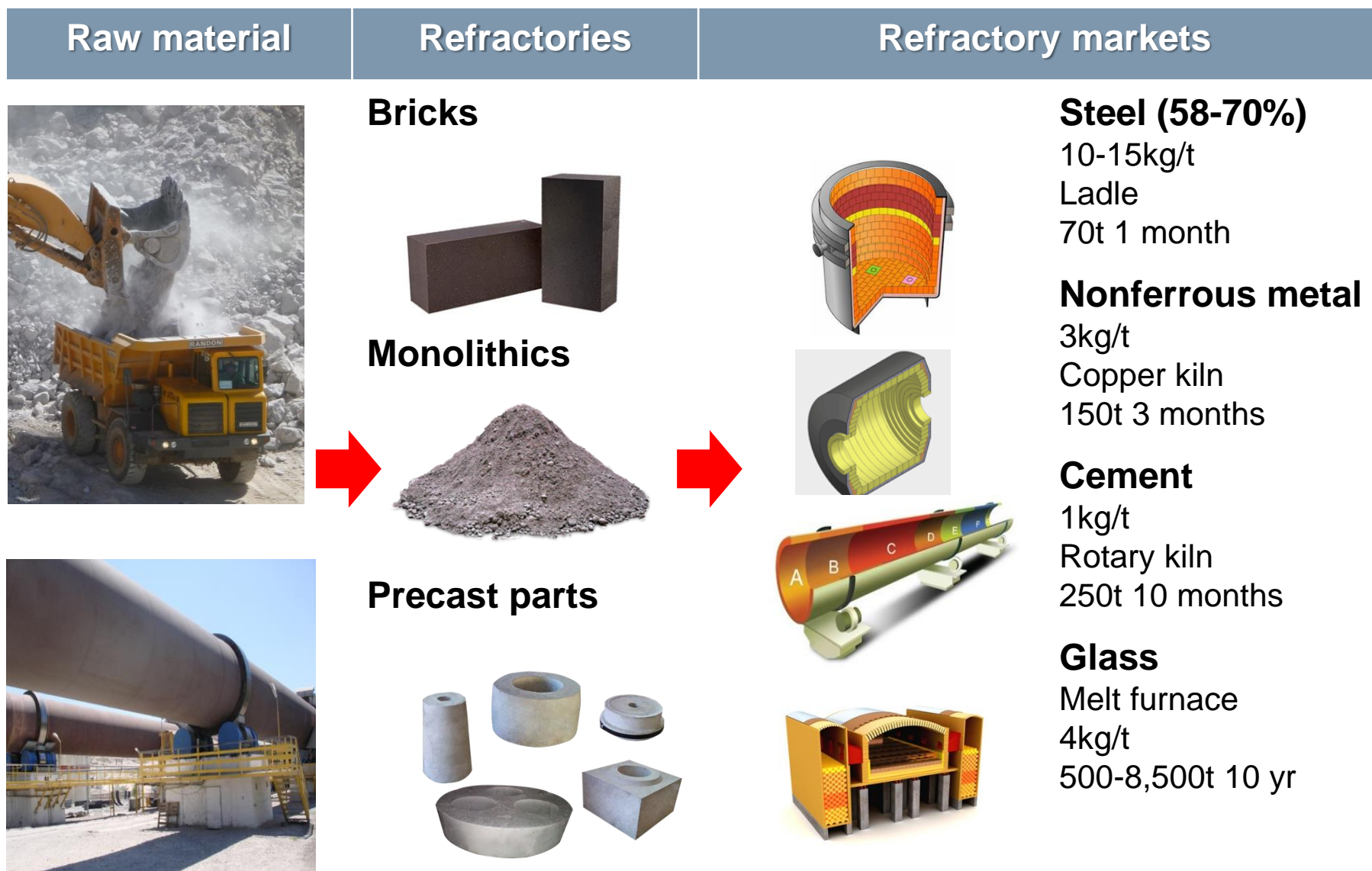
We tend to neglect the importance of sources of raw materials, we take them for granted.

Our efforts are aimed at the end product and we neglect the raw material, we need to get closer to the source.

W. H. “Bauxite Bill” McCracken (1923-2016)
world authority on refractory raw materials
formerly of F&S International, Harbison Walker Refractories



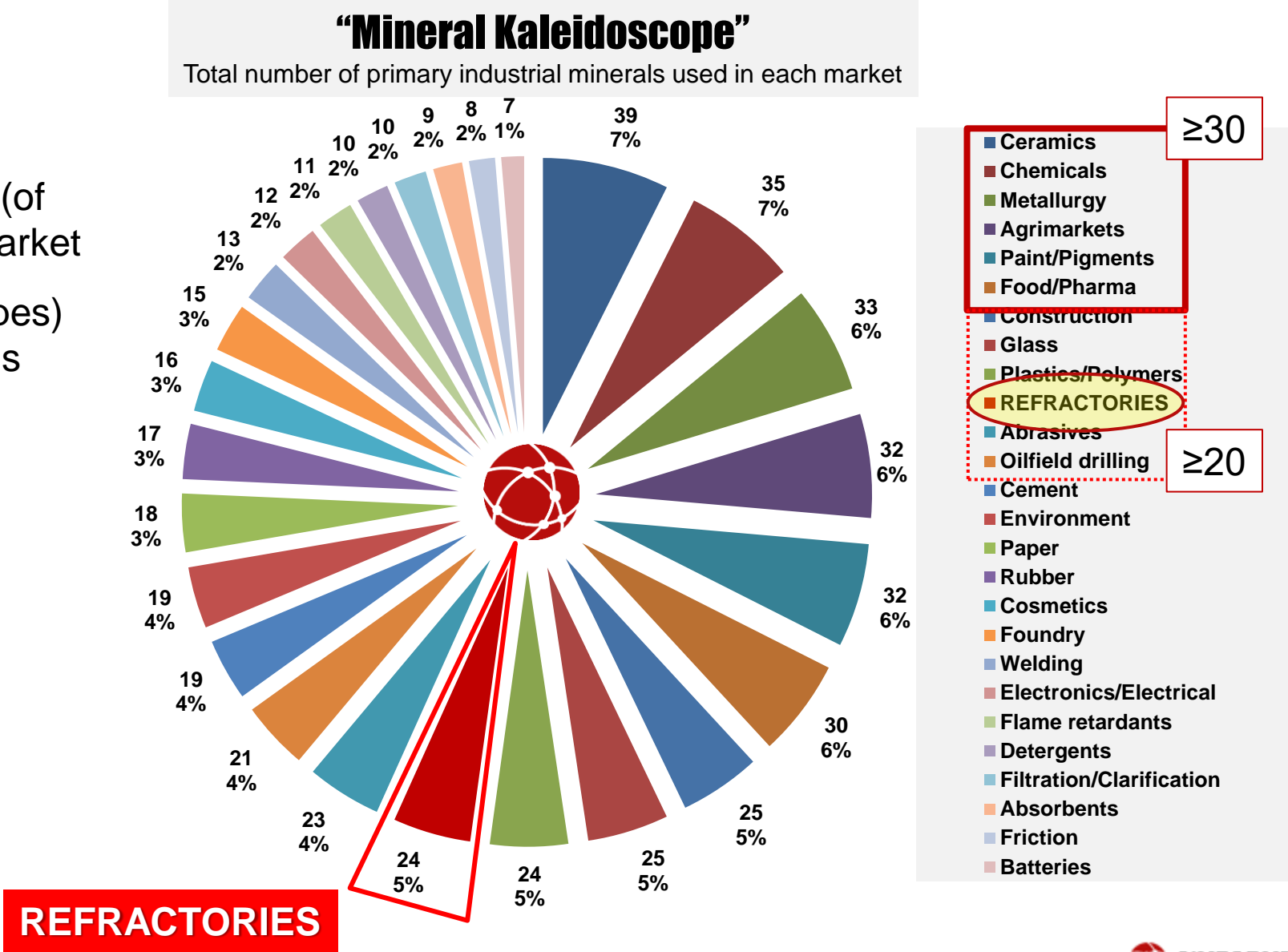
Refractory minerals overview



Refractory minerals overview

Significant industrial minerals category

- Refractories ranked 10th (of 26) most important IM market
- Consumes 38.7% (24 types) of main industrial minerals (total 62 types)





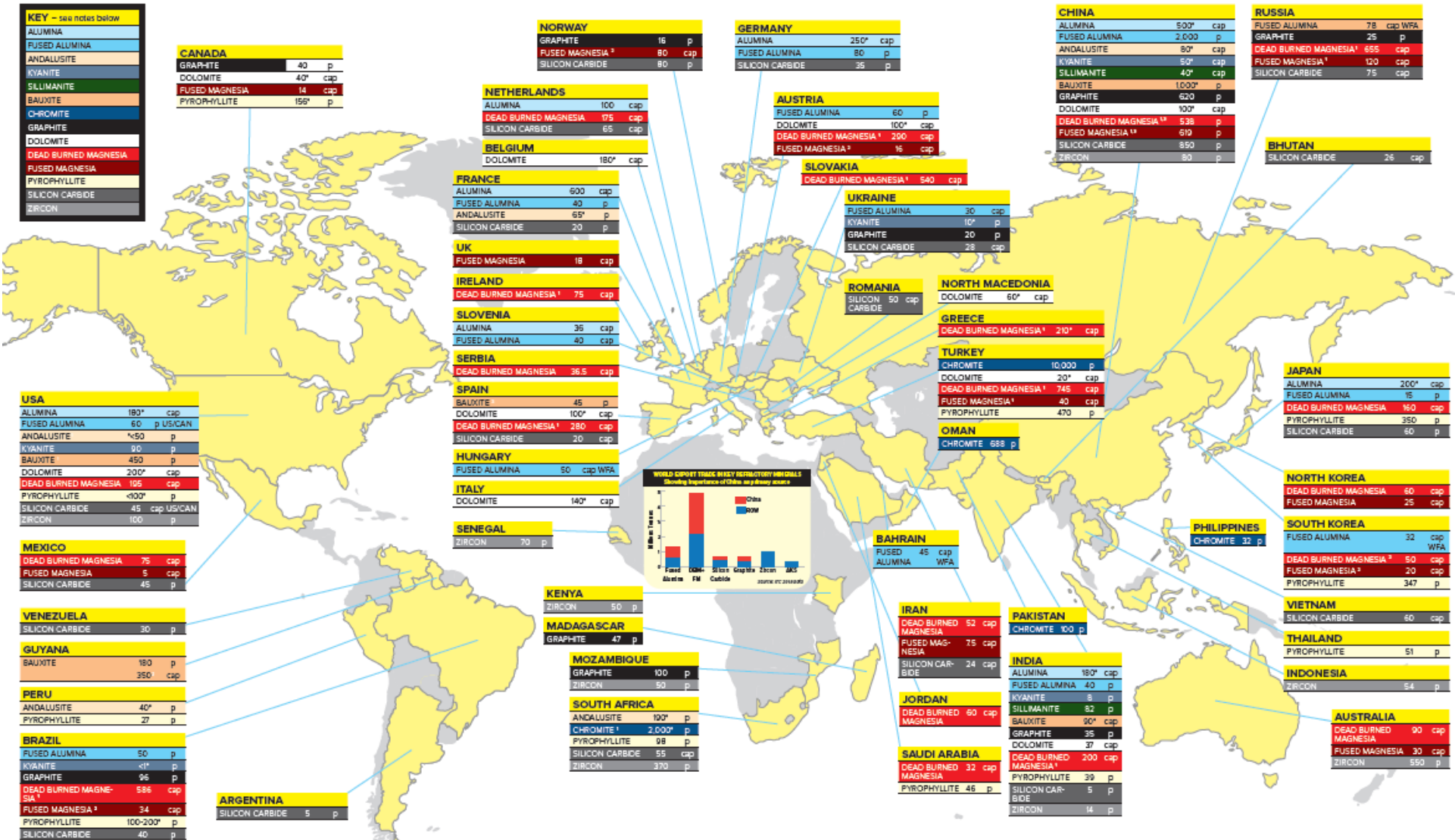
Refractory minerals overview

World distribution of primary established sources of main minerals



REFRACTORY
RAW MATERIAL
WORLD SOURCES MAP®

New Edition



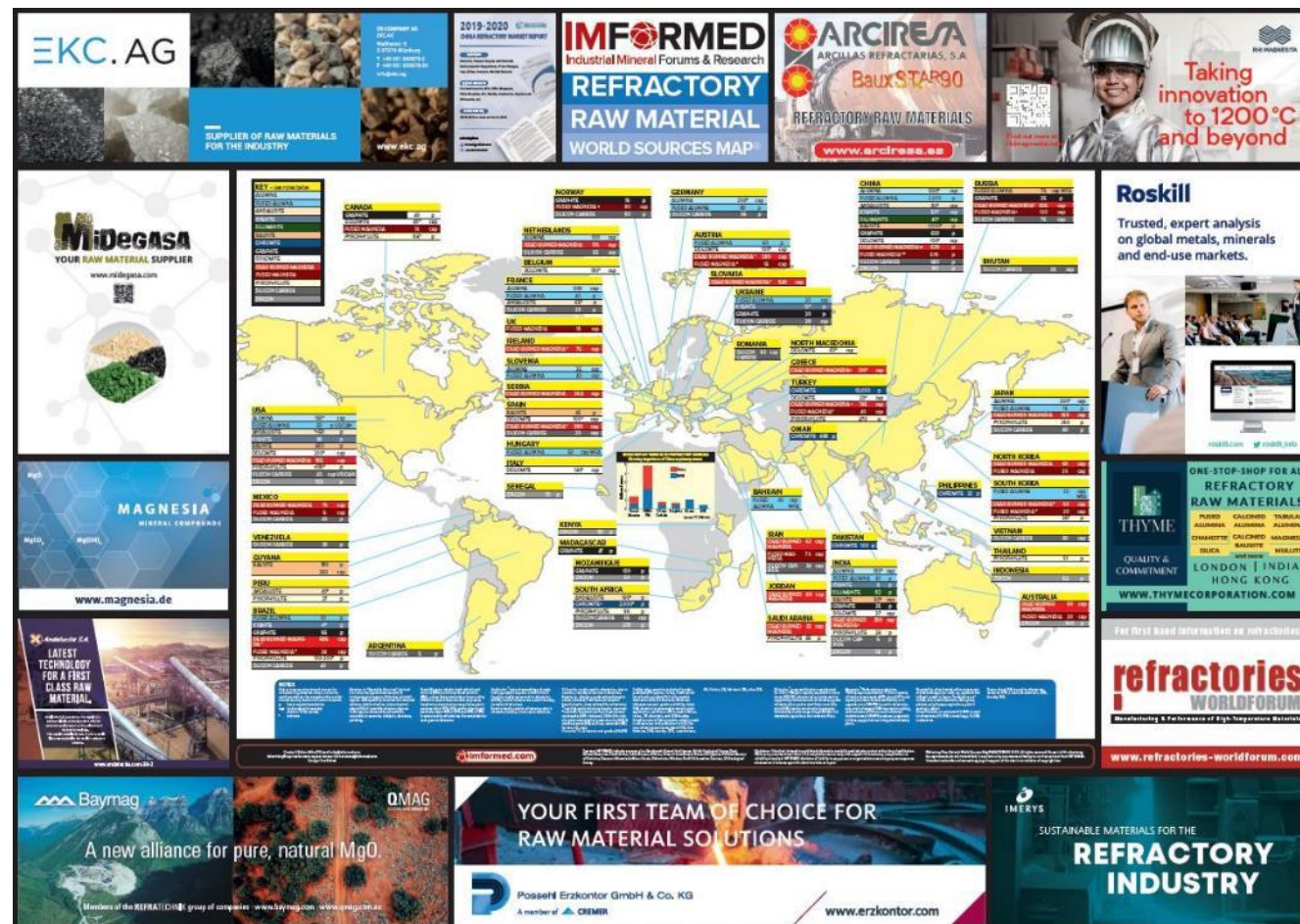
REFRACTORY RAW MATERIAL WORLD SOURCES MAP

2nd edition out now! More minerals included

Primary world sources and
production capacity of key
refractory raw materials

Alumina | Fused Alumina | Andalusite | Kyanite |
Sillimanite | Bauxite | Chromite | Graphite | Dead
Burned Magnesia | Fused Magnesia | Pyrophyllite
| Silicon Carbide | Zircon

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MAGFORUM 2021

Magnesium Minerals & Markets Conference

Tue-Wed 29-30 June 2021

ONLINE



FLUORINE FORUM 2021

Wednesday 20 October 2021

ONLINE



CHINA REFRACTORY MINERALS FORUM 2021

Wednesday 3 November 2021

ONLINE



IMFORMED *Rendezvous*

Grand Hotel Huis ter Duin (Noordwijk),
Amsterdam, 24-26 April 2022



OILFIELD MINERALS & MARKETS **FORUM** HOUSTON 2022



Hilton Houston Post Oak, Hilton, 23-25 May 2022

MAG**FORUM** 2022



Magnesium Minerals & Markets Conference
Grand Hotel Huis ter Duin (Noordwijk),
Amsterdam — 7-9 June 2022

FLUORINE **FORUM** 2022

Pan Pacific Hanoi
17-19 October 2022



CHINA REFRACTORY MINERALS **FORUM** 2022

InterContinental Dalian
12-14 September 2022





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

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FORUM 2021

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Missed the Forum?

A full PDF set of presentations & access to live recording maybe purchased

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