

MAGFORUM 2017

Magnesium Minerals & Markets Conference
Radisson Blu Hotel, Kraków, 11-13 June 2017



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Welcomes you to Kraków



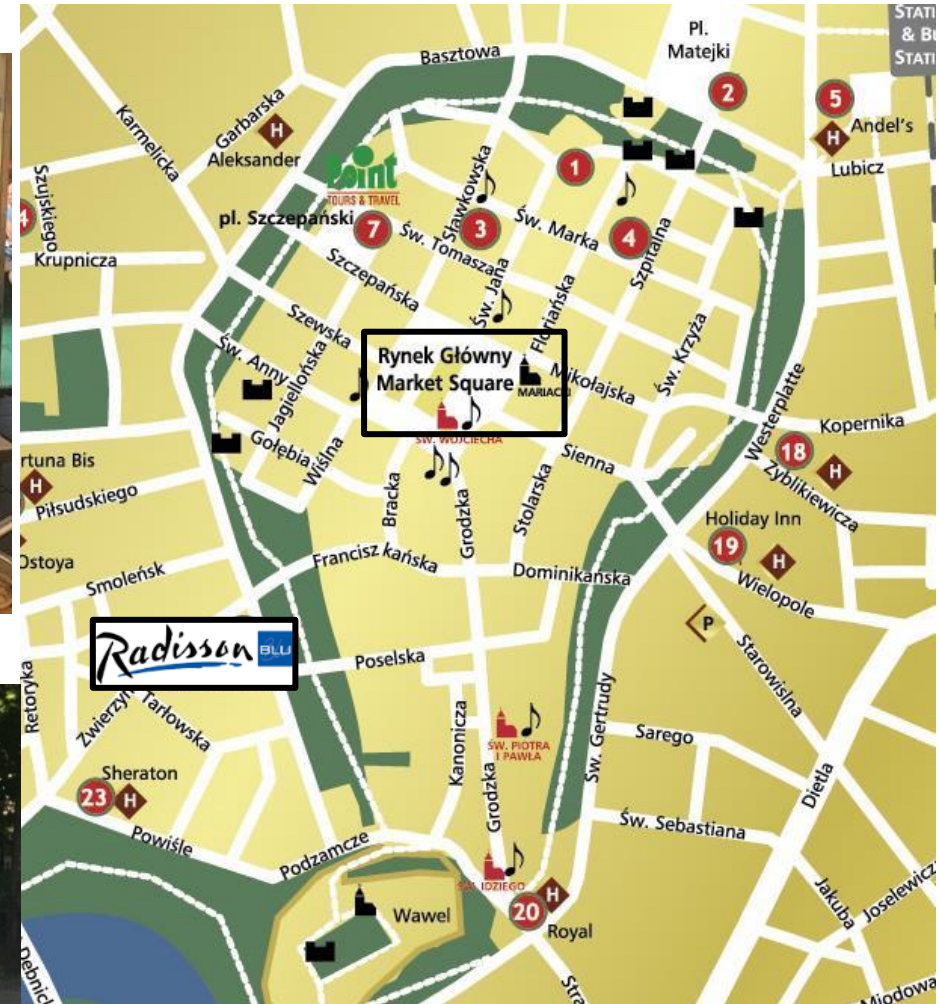
Kraków
MAGFORUM 2017
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Ropczyce



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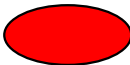
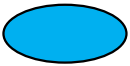

MagForum in Kraków: Why?



Crude steel
8.9m tonnes 2016
5th in EU
18th in World



1862 | Magnezyty Grochów SA

- Deposits
-  Magnesite
 -  Dolomite
 -  K-Mg Salt

Source: data from Polish Geological Institute

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The world of magnesia

A world of diversity



The world of magnesia: source diversity

- **Magnesia = magnesium oxide, MgO**
- **“Magnesia” = a group of magnesium compounds**

magnesium oxide

magnesium carbonate

magnesium hydroxide carbonate

magnesium hydroxide

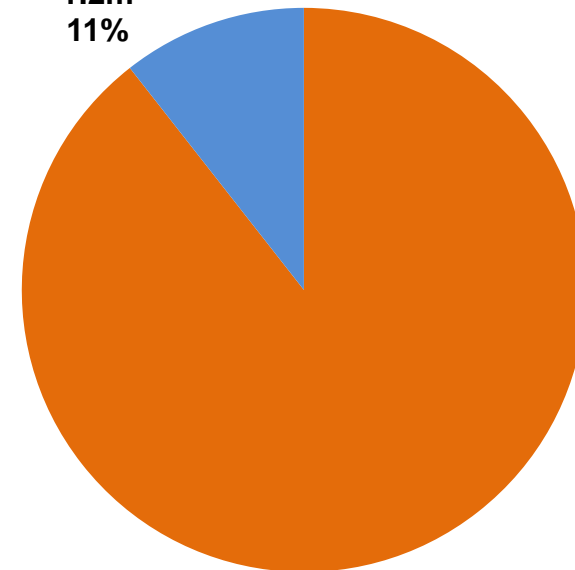
- **Two primary sources of magnesia**

Natural magnesia from naturally occurring minerals

Synthetic magnesia from seawater, Mg salt brines

World magnesia production capacity
11.9m tonnes MgO equivalent

Seawater/brines
1.2m
11%



Magnesite
10.7m
89%

Source: USGS



The world of magnesia: market diversity

MAGNESITE & MAGNESIA

RAW MAGNESITE	DEAD BURNED MAGNESIA	ELECTROFUSED MAGNESIA		CAUSTIC CALCINED MAGNESIA		MAGNESIUM METAL
		Refractory 97%+ MgO	Electrical insulation	Synthetic CCM	Natural CCM	
<p>Mg metal Fertiliser Glass, ceramics, rubber, insulation Paper, plastics, pigment filler Surface coating explosives Pesticide carrier Landscaping</p>  	<p>Refractory bricks Gunning mixes Castables Welding</p>   	<p>Transformer steel coatings Refractory bricks</p>	<p>Cable insulation Electrical elements UV sensors Hi-tech ceramics</p> 	<p>HP EFM electrical Mg metal Mg chemicals Pharmaceutical Ceramics UHP MgO</p>	<p>Magnesia cements</p> <p>Insulation boards Sorel cement flooring Adhesives Concrete/cement Coatings Paints Abrasive wheels</p> <p>Agriculture</p> <p>Animal feed Fertiliser</p> <p>Environmental</p> <p>Water/waste treatment FGD CCS</p> <p>Ceramics Metallurgical flux Plastic filler Pesticide carrier Designer ceramics Foundry sand Coatings Absorbent Dessicant Flame retardant Lubricant additive Fuel additive Slag conditioner Hydrometallurgy</p> 	 

The world of magnesia: discussion points



- **Supply**
 - new capacities
 - plant reductions/idling
 - new/alternative sources

- **China**
 - demise of export quotas
 - impact of environment & dynamite controls
 - impact of costs – taxes, trucking, energy
 - structure of supply sector
 - domestic demand

- **Markets**
 - steel outlook
 - other refractory markets
 - industrial/speciality opportunities

- **Corporate landscape**
 - RHI-Magnesia merger
 - more consolidation?



Status & outlook for the magnesia market

Moderator

Mike O'Driscoll

Director, IMFORMED, UK

Panellists

Evandro De Souza

Marketing Director for Overseas Markets, ZM Ropczyce,
Poland

James F. King

Steel Consultant, UK

Andreas Kriegl

Head of Raw Material Supply, RHI AG, Austria

Michael Tsoukatos

Business Development Director, Grecian Magnesite SA,
Greece

**Questions & comments welcome
from the audience**

Please state your name & affiliation



China



Markets



Programme – Monday Morning

- 08.30 **Opening Remarks**, Ismene Clarke, Director, IMFORMED, UK
Introduction, Mike O'Driscoll, Director, IMFORMED, UK
- 08.45 **Welcome Address**
Jerzy Gdula, Sales Director, ZM Ropczyce, Poland

KEYNOTE DISCUSSION PANEL

- 09.00 **Outlook for the magnesia industry**
Moderator
Mike O'Driscoll, Director, IMFORMED, UK
Panellists
- **Andreas Kriegl, Head of Raw Materials Supply, RHI AG, Austria**
 - **Evandro De Souza, Marketing Director for Overseas Markets, ZM Ropczyce, Poland**
 - **Michael Tsoukatos, Business Development Director, Grecian Magnesite SA, Greece**
 - **James F. King, Steel Consultant, UK**

09.45 COFFEE

REFRACTORY MARKET

- 10.45 **The changing face of the global refractories industry**
Dr Richard Flook, Managing Principal, Mosman Resources Ltd, Australia
- 11.15 **The refractory materials industry in Poland: continuity despite change**
Dr Jerzy Czechowski, Secretary, Refractory Materials Manufacturers Association of Poland, Poland
- 11.45 **Magnesia in refractories**
Evandro De Souza, Marketing Director for Overseas Markets & Wiesław Zelik, Manager of Research and Development Center, Head of Technology, ZM Ropczyce, Poland

12.15 LUNCH



Programme – Monday Afternoon

SUPPLY TRENDS: CHINA | RUSSIA | NETHERLANDS

- 14.00 **Current status, structure, and outlook for China's magnesia industry**
Zhao Haixin, Chief Investment Officer, Hejun Capital, China
- 14.30 **Russian Magnezit: New efficiency, new quality and new opportunities for your business**
Dmitry Borzov, Managing Director, Magnezit Group Europe GmbH, Germany
- 15.00 **Squeeze mining: the best solution to a solid future!**
Frans Goorman, Technology Director, Nedmag, the Netherlands

15.30 COFFEE

RESOURCES: MAGNESITE | DOLOMITE | BRUCITE

- 16.00 **Magnesite and dolomite resources and production in Poland**
Krzysztof Galos, Asst. Prof. Deputy Director for General Affairs, Mineral and Energy Economy Research Institute of the Polish Academy of Science, Poland
- 16.30 **Dolomite: supply and applications**
Ted Dickson, TAK Industrial Mineral Consultancy, UK
- 17.00 **Brucite, Huntite, and Hydromagnesite: supply and markets**
Dr Ian Wilson, Ian Wilson Consultancy, UK

17.30 CLOSE OF CONFERENCE DAY 1

18.30 NETWORKING DRINKS RECEPTION, 
WIERZYNEK RESTAURANT SPONSORED BY RHI AG



Programme – Tuesday Morning

MARKETS 1: STEEL | CEMENT

- 08.30 **The prospects for steel production**
James F. King, Steel Consultant, UK
- 09.00 **Cement and concrete markets: global outlook**
Koen Coppenholle, Chief Executive, CEMBUREAU, Belgium
- 09.30 **Magnesia cement boards: the next generation**
Sibel Hizlan, General Manager, AK ALEV, Turkey

10.00 COFFEE

MARKETS 2: FLAME RETARDANTS | PAPER |

HYDROMETALLURGY | ENVIRONMENT

- 10.30 **Overview of the magnesium chemicals market: focusing on magnesium hydroxide and flame retardants**
Samantha Wietlisbach, Principal Analyst Chemical, IHS Markit, Switzerland
- 11.00 **The use of magnesium products in the pulp and paper industry**
Rudolph März, Managing Director, Kürzeder & März Bleichhilfsmittel, Germany
- 11.30 **CCM in hydrometallurgy: outlook for the nickel market**
Thomas Höhne-Sparborth, Director, Economics & Analytics, Roskill Information Services Ltd, UK
- 12.00 **New horizons in environmental applications & use of magnesia seeds**
Yusuke Saito, Magnesia Division & Yoshihiro Nishimura, Fine Material Division, Ube Material Industries Ltd, Japan

12.30 LUNCH



Programme – Tuesday Afternoon

MARKETS 3: NON-REFRACTORY | WELDING

- 14.00 **Turkey's magnesite for non-refractory magnesia markets**
Asım Bilge, Production Chief, Raw Materials, Kumus, Turkey
- 14.30 **Dead burned magnesia qualities for the welding industry**
Sonja Larissegger, Technical Marketing Manager, RHI AG, Austria

15.00 COFFEE

NEW DEVELOPMENTS:

MIDDLE EAST | AUSTRALIA | SYNTHETIC MAGNESIA

- 15.30 **Development of a magnesite company in the Middle East**
Nicolas Gangutia, Managing Director, Ganmag Magnesite Solutions, Spain
- 16.00 **Development of the Winchester magnesite deposit, Northern Territory, Australia**
Andrej Karpinski, Executive Chairman, Korab Resources Ltd, Australia
- 16.30 **Recovering high purity magnesium compounds from salar brines and bitterns**
Dr Tam Tran, Technical Director & Tony Crimmins, Executive Chairman, EcoMag Ltd, Australia
- 17.00 **Synthesising low carbon footprint, high quality magnesia**
Paul Boudreault, Business Development, ECO2Magnesia, Canada

17.30 CLOSE OF CONFERENCE



Programme – Wednesday

WEDNESDAY 14 JUNE 2017

FIELD TRIP TO ZM ROPCZYCE

- 07.45 **Meet in Radisson Blu Hotel lobby**
- 08.00 **Bus departure for ZMR**
- 10.00 **Arrival at Ropczyce for introduction and safety briefing**
- 10.30 **Tour of ZMR plant**
- 12.30 **Lunch**
- 14.30 **Depart Ropczyce**
- 16.00 **Arrive Radisson Blu Hotel, Kraków**



Your Chairpersons



Mike O'Driscoll
Director, IMFORMED



Gerry Clarke
Consultant

- Mine Geologist, graduated from University of Wales (Cardiff), Applied Mineralogist
- Lecturer in Economic Geology at Plymouth University
- Editor of *Industrial Minerals* magazine
- Executive Director of Metal Bulletin Plc
- Member of the Institute of Materials, Minerals and Mining
- Chartered Engineer.



Ted Dickson
Consultant

- BSc Geology from Edinburgh University; MSc Mineral Exploration from the Royal School of Mines, London
- American Editor of *Industrial Minerals* magazine
- Consultant >23 years specialising in market intelligence for the industrial minerals



AGH University of Science & Technology
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Akdeniz Mineral Kaynaklari A.S
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Antea Cement - Titan Group
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Value Added Europe
Vesuvius GmbH
Weerulin GmbH
Xilolite SA
Yingkou Baoa Mineral Pty Ltd
ZM Ropczyce SA





Picture Gallery



The programme covers all the points of view of the market; absolutely fantastic venue.

Alex Aizpurua, Marketing Manager, Midegasa, Spain

Excellent depth of programme with several fields covered

Vassilis Kandiannis, Director, MagmaCom SA, Greece

Overall top class, good location, and well organised

Ted Dickson, TAK Industrial Mineral Consultancy, UK

Very good and interesting; good venue and very good organisation.

Tomohiro Oki, Sales Manager, Tanisho & Co. Ltd, Japan

Nice combination of raw materials and end market issues; nice city and hotel.

Alexandros Yfantis, Procurement Manager, Titan Cement Co. SA, Greece

Interesting, touching the exact points for current interest.

Jerzy Gdula, Sales Director, ZM Ropczyce SA, Poland

Excellent, varied, and comprehensive programme

Anthony McEneaney, Project Manager, RHI AG, Ireland

Top class panel discussion, could have been longer

Pravin Kumar, Director, Magus Marketing Pvt Ltd, India

Thank you for the great organisation. We had a good experience again.

Sibel Hizlan, AK ALEV, General Manager, Turkey



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graphite industry, from mine to market

- Graphite in refractories, foundry, steel
- Impact of Li-ion batteries on graphite availability

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**REFRACTORY
RAW MATERIAL
WORLD SOURCES**

KEY - see notes below

- ALUMINA
- FUSED ALUMINA
- ANDALUSITE
- BAUXITE
- CHROMITE
- GRAPHITE
- DEAD BURNED MAGNESIA
- FUSED MAGNESIA
- SILICON CARBIDE
- ZIRCON

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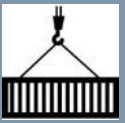



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Explained & Summarised

- Market structure
- Market drivers
- Supply chain tiers
- Working examples
- Influencing factors
- Anatomy of pricing
- Direct, intermediate & end markets
- Investment approaches & indicators
- Key steps to success

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