

SUMMARY SLIDE DECK

#FluorineForum

FLUORINE FORUM 2017 San Luis Potosí, Mexico 30 Oct-2 Nov 2017



Mexichem.







MINING



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Mexichem. Welcomes you to San Luis Potosí









IMF®RMED Welcomes you to San Luis Potosí









FLUORINE **F@RUM** 2017

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FLUORINE FORUM 2017 San Luis Potosí, Mexico 30 Oct-2 Nov 2017

Why are we here?



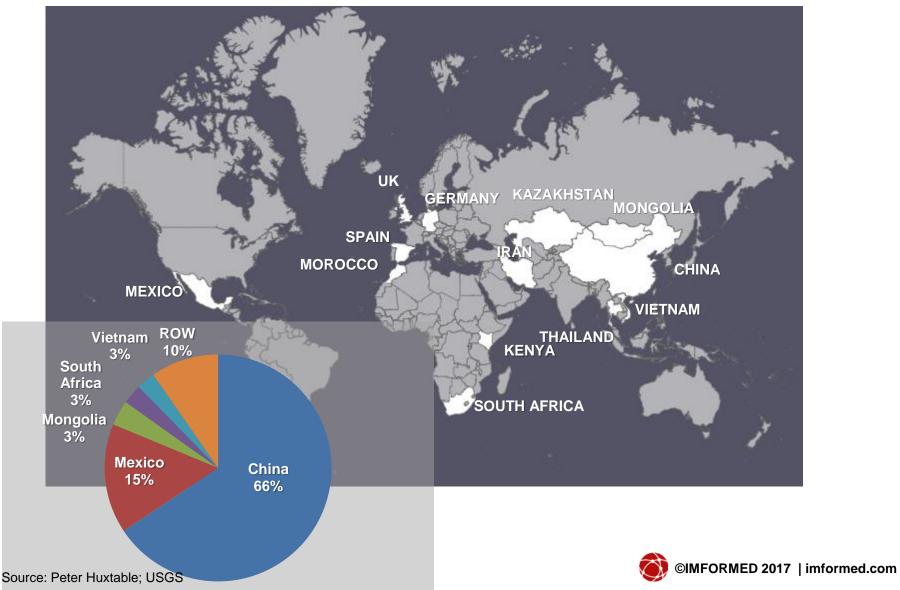




Introduction

World fluorspar production

Total 5.68m tonnes



Introduction

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"Interesting times!"

- Changes in supply capacity availability •
 - reduced output, metspar scarcity?
 - closures
 - newcomers
 - potential new sources
 - interest in FSA feasibility

China's continuing influence

- \succ supply: impact of recent government measures, diminishing quality reserve concerns
- \succ domestic demand: AIF₃, HF, steel growing, a future net importer of fluorspar?

Evolving markets ٠

- more uses for metspar
- steel and aluminium demand drivers: India growth prospects
- fluorochemicals: HFC phase out & replacements, new hi-tec applications, eg. Li-ion batteries



Programme – Tuesday Morning

- 08.45 Introduction Ismene Clarke, Director, & Mike O'Driscoll, Director, IMFORMED
- 09:00 Welcome Address Gustavo Puente, Secretary of Economic Development, State of San Luis Potosí, Mexico

KEYNOTE OVERVIEWS 1

- 09:15 Mexichem: Leading the fluorspar industry today and tomorrow Andrés Múgica Jiménez de la Cuesta, President, Fluor Business Group, Mexichem, Mexico
- 09:45 Global fluorine production and supply trends Michele McRae, Fluorspar & Barite Specialist, US Geological Survey, USA

10:15 COFFEE

11:15 Keynote Panel Discussion: Status of the Fluorine Market



KEYNOTE DISCUSSION PANEL

FLUORINE **F®RUM** 2017

Status & outlook for the market

Moderator Mike O'Driscoll

Director, IMFORMED, UK

Panellists

Malcolm Crawford

Fluorspar specialist, Delta Minerals Ltd, UK

Kerry Satterthwaite

Manager, Industrial Minerals, & Carbon & Chemicals, Roskill Information Services Ltd, UK

Johannes Scheruhn

General Manager, Scheruhn Industrie Mineralien GmbH, Germany

Ray Will

Director Chemical Consulting, Specialty and Inorganic Chemicals, IHS Markit Ltd, USA

PLEASE JOIN IN! Questions & comments most welcome from the audience

Please state your name & affiliation







Programme – Tuesday Afternoon

12:15 LUNCH

REGIONAL 1: CHINA | MEXICO

- 14:00 The evolving influence of China on the world fluorspar market Kerry Satterthwaite, Division Manager, Industrial Minerals & Carbon & Chemicals, Roskill Information Services Ltd, UK
- 14:30 Mexico's fluorspar resources and production Armando Alatorre, Industrial Minerals Consultant, Mexico

15:00 COFFEE

REGIONAL 2: SOUTH AFRICA

- 15.30 **Doornhoek: One of the world's largest fluorspar deposits** Allan Saad, CaF2 SA Fluorite Pty Ltd, South Africa
- 16:00 SepFluor's Nokeng Mine Rob Wagner, Chief Executive Officer, SepFluor Ltd, South Africa
- 16:30 Downstream fluorochemical industry development activities and progress in South Africa Chris Potgieter, Director, BFluor Chemicals (Pty) Ltd, South Africa

17:00 CLOSE OF DAY 1

Networking Drinks Reception on Terrace



Programme – Wednesday Morning

KEYNOTE OVERVIEWS 2

- 08:30 The shaky supply-demand balance of acidspar: facts and fortune telling Oliver Rhode, Managing Director, XENOPS Chemicals GmbH & Co. KG, Germany
- 09:00 Fluorspar to 2018 and beyond Gerry Clarke, Consultant, & Peter Huxtable, Consultant, UK
- 09.30 **Recent advances and trends in fluorine-based chemicals manufacturing** Olivier Ruffiner, Business Manager Fluorine, Buss ChemTech AG, Switzerland

10:00 COFFEE

SUPPLY CHAIN INPUTS

- 11:00 **Cost pressures in acid-grade fluorspar & downstream industries** Ashok Shinh, Ashok Shinh Consulting Ltd, UK
- 11:30 **Sulphuric acid a key factor in fluorochemical production: a global outlook** Fiona Boyd, Director, Acuity Commodities, USA
- 12:00 Shipping fluorspar and the dry bulk market outlook Aernaut Meijer, Director North America Dept., Spliethoff Transport BV, the Netherlands

12:30 LUNCH



Programme – Wednesday Afternoon

PROCESSING

- 14:00 Upgrading fluorspar material using optical, near infrared and laser sensor-based sorting Harold Cline, North American Area Sales Manager, Tomra Sorting Solutions, USA
- 14:30 Separation technology solutions for the fluorspar industry Lütke von Ketelhodt, Business Development Manager – Mining Market, Steinert US, USA

15:00 COFFEE

MARKET TRENDS & OUTLOOK

- 15:30 Global steel supply and demand outlook Justine Coyne, Asst. Editor, Steel Markets, S&P Global Platts, USA
- 16:00 Adoption of non-fluorochemical refrigerants: a reset of expectations for the future? Ray Will, IHS Markit Ltd, Director Chemical Consulting, Specialty and Inorganic Chemicals, USA
- 16:30 Fluorspar use and demand as a welding flux David Fedor, Global Consumable Chemicals Mgr & R&D, Lincoln Electric Co., USA
- 17:00 Fluorspar application in the cement market David Guerrero, Optimization Manager, Cementos Fortaleza, Mexico

17:30 CLOSE OF DAY 2

Introduction

FLUORINE **F@RUM** 2017

FIELD TRIP Thursday 2 November 2017

Visit to Mexichem mine & plant

Itinerary*

- 08.15 Meet in Hilton Hotel lobby
- 08.30 Bus departure for Las Cuevas
- 09.45 Mine/plant induction briefing & tour
- 13.00 Depart for SLP
- 14.00 Lunch & tour Centro de las Artes, SLP
- 17.00 Depart Centro de las Artes
- **17.30** Arrive Hilton Hotel * approximate timings; subject to change

Please ensure that you wear suitable casual clothing and appropriate footwear as befits an industrial plant tour.

Mexichem.



Your Chairpersons



Mike O'Driscoll Director, IMFORMED



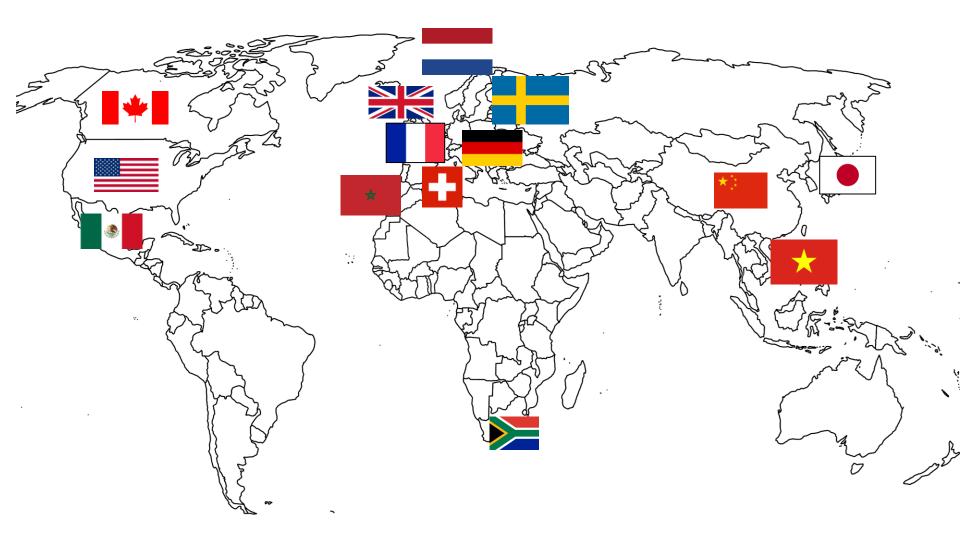
Gerry Clarke Consultant



AB Indesko Acuity Commodities Ashok Shinh Consulting Ltd BASF Corp **BFluor Chemicals** Britannia Refined Metals Ltd Buss Chem Tech AG CaF2 SA Fluorite Pty Ltd Carl Spaeter GmbH Castmet Cementos Fortaleza Cemex Supply CMC Cometals Cremer Erzkontor Delta Minerals Ltd Eurolinex GmbH Fluorchemie Stulln GmbH Fluorita de Múzquiz SA de CV **Glencore International AG Hicks Dome** Honeywell I.H.S Markit Ltd

IMFORMED Industrial Minerals Consultant Lincoln Electric Co. Mexichem Nui Phao Mining Co Ltd S&P Global Platts PotashCorp Quimobasicos Del Noreste Sa de CV Roskill Information Services Ltd Scheruhn Industrie Mineralien GmbH Seaforth Mineral & Ore Inc. SepFluor Ltd Silvateam Sojitz Corporation Spliethoff Transport BV Steinert US The Chemours Company **TOMRA Sorting Inc** TRAXYS **US Geological Survey** XENOPS Chemicals GmbH & Co. KG







Picture Gallery



Excellent coordination of the event, congratulations. Excellent venue, good programme.

Arnoldo de Leon, Commercial Director, Mexichem, Mexico

Really strong programme, particularly enjoyed panel discussion Anna Carson, Britannia Refined Metals Ltd, UK

Excellent array of speakers from the full spectrum of the fluorine industry Jordan Rutledge, Silvateam, USA

Very good, full coverage Hector Valle, Consultant, Mexico

Incredibly well-organised considering this is the inaugural luorine Forum! Great line-up of speakers and diversity in topics Ben Cowie, Seaforth Mineral & Ore Inc., USA

Covering all important topics, not only a meeting place to negotiate prices! Panel discussion was very good. Olivier Ruffiner, Buss Chem Tech AG, Switzerland



Missed attending Fluorine Forum 2017?

A set of presentations (as PDF) maybe purchased: Price £500 – please contact:

Ismene Clarke, T: +44 (0)208 224 0425; M: +44 (0)7905 771 494; E: <u>ismene@imformed.com</u>

Ensure you don't miss out on news and updates for the next **Fluorine Forum**!

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FLUORINE FORUM 2018 Hotel Wellington, Madrid 15-17 October 2018



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Introduction





Networking and knowledge for the industrial minerals business







- Launched in January 2015
- Extensive experience & reputation
- Market research
- Specialist conferences



FLUORINE **F©RUM** 2017



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

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

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Conferences in 2018 click title for details

OILFIELD MINERALS & MARKETS FORUM Middle East 2018

InterContinental Regency, Bahrain, 5-7 February 2018

MINERAL RECYCLING

Radisson Blu Hotel, Cologne, 15-16 March 2018 Secondary raw material sources, supply, processing, and markets

OILFIELD MINERALS & MARKETS

Hilton Houston Post Oak, Houston, 6-8 May 2018

MAGFORUM 2018

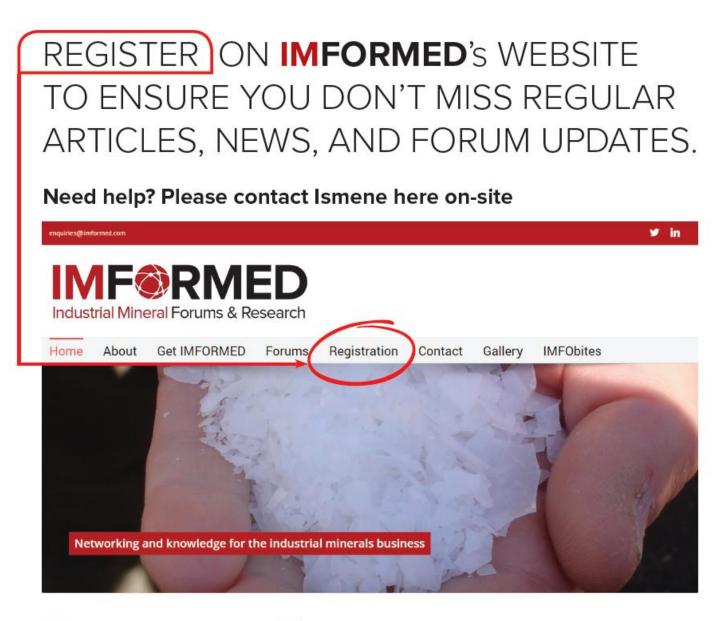
Magnesium Minerals & Markets Conference Grand Elysée Hotel, Hamburg — 17-19 June 2018

CHINA REFRACTORY & ABRASIVE MINERALS FORUM 2018

Regal International East Asia Hotel, Shanghai, 10-12 September 2018

FLUORINE FORUM 2018 Hotel Wellington, Madrid 15-17 October 2018

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