



CHINA REFRACTORY MINERALS **FORUM** 2022

Wednesday 14 September 2022

ONLINE



Supporting Partners





“Very good information update and future trends”

Marcio Lario, Founder & Board Member, Bautek Minerais Industriais, Brazil

“It was a very interesting and informative session.”

Alfred Vermeulen, Director Commercial APAC, Access World, Singapore

Access World
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Bautek Minerals Industriais
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Fupeng International Group Ltd
Ganmag Magnesite Solutions
Global Monarch FZC
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Imerys
Imerys China Refractory
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Meladore Ltd
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Nedmag
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RHI Magnesita
Sarvesh Refractories Ltd
SEFPRO- Saint Gobain
TIMAB Magnesium
TRB France
Valoref
Vesuvius
Wonjin Worldwide
ZM Ropczyce S.A

PROGRAMME*

All times shown are BST
(corresponding time zones
shown)

* All timings approximate; subject
to change

BST	CET+1	EDT-5	SGT+7	
10:00	11:00	05:00	17:00	Welcome & Introduction Ismene Clarke & Mike O’Driscoll, Directors, IMFORMED, UK
10:30	11:30	05:30	17:30	China refractories outlook Dr Richard Flook, Managing Director, Mosman Resources, Australia
11:00	12:00	06:00	18:00	Current status & outlook for Chinese magnesia production & exports Hellen Du, Sales Manager, Fupeng International Group Ltd, China
11:30	12:30	06:30	18:30	Graphite trading trends in transition Jack Gao, Managing Director, Refmin China Co. Ltd, China
12:00	13:00	07:00	19:00	BREAK

USE LINK 1

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BST	CET+1	EDT-5	SGT+7	
12:30	13:30	07:30	19:30	India’s refractory market future & the influence of Chinese raw material supply Parmod Sagar, Managing Director & CEO, RHI Magnesita India Ltd, India
13:00	14:00	08:00	20:00	Sustainability in the refractory market Chen Feng, Sales Director, Imerys China Refractory Producers, China
13:30	14:30	08:30	20:30	Shipping market outlook from China Eddie Boo Koh, Regional General Manager – Greater China Area, Access World, Singapore
14:00	15:00	09:00	21:00	Reliance on China: is it strategically advisable? Knowns & Unknowns James Devlin, Managing Director, China Mineral Processing Sales Europe, UK
14:30	15:30	09:30	21:30	ROUNDTABLE BREAKOUT SESSION <i>Informal Networking & Discussion</i>

USE LINK 1

USE LINK 2

Global refractory mineral supply

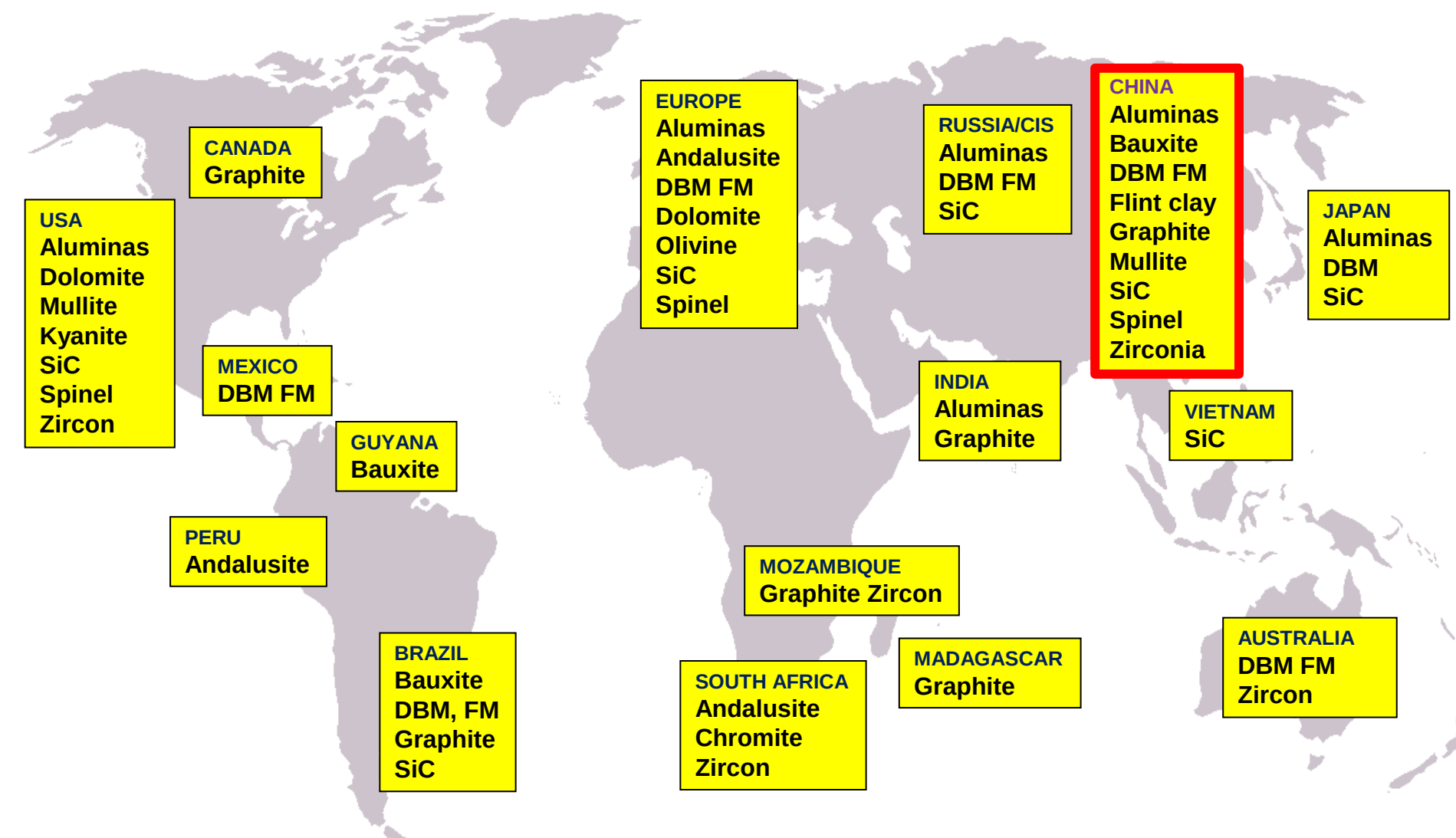
Ending of an era?

A change of course?

Courtesy: Kasana

Refractory mineral supply overview

Summary of world distribution of primary established sources of main traded minerals



Mineral	Total no. country sources*
DBM	21
Silicon carbide	20
Fused alumina	14
Fused magnesia	12
Pyrophyllite	11
Dolomite	9
Graphite	9
Zircon	9
Aluminas	8
Kyanite	5
Andalusite	5
Bauxite	4
Chromite	4

Note:

1. certain sources supply only regional/local markets
2. others are captive to consumers

Refractory mineral supply overview

World annual production capacity 2020/21 selected minerals

DBM	k. tonnes
Total	10,500
China	(48%) 5,000
Russia	2,500
Turkey	760

Calcined Bauxite	k. tonnes
Total	1,225
China	(82%) 1,000
Guyana	180
Spain (Guyana)	45

Silicon Carbide	k. tonnes
Total	1,000
China	(45%) 450
Norway	80
Japan	60

FM	k. tonnes
Total	2,100
China	(90%) 1,900
Russia	115
Turkey	40

Zircon	k. tonnes
Total	1,200
Australia	400
South Africa	270
China	(12%) 140

Andalusite	k. tonnes
Total	310
South Africa	160
France	55
Peru	45

Fused Alumina	k. tonnes
Total	1,300
China	(62%) 800
Germany	80
USA/Austria	60

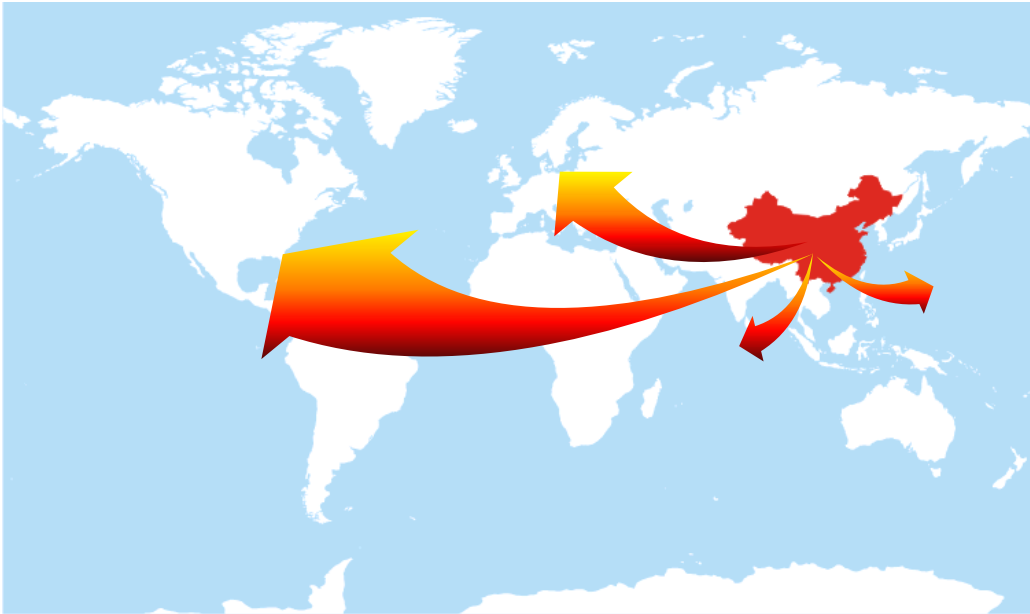
Graphite	k. tonnes
Total	1,000
China	(82%) 820
Brazil	68
Mozambique	30

Source: INFORMED estimates; USGS

Refractory mineral supply overview

China export dominance | 2021 exports

Refractory Mineral Export	Volume tonnes	World share avg 2016-20	Value US\$m.
BFA	564,877	59%*	719.2
WFA	393,324		477.3
Bauxite	1,014,467	90%**	279.7
Graphite	121,719	52%	137.0
DBM	1,239,617	54%*	326.3
FM	615,473		366.5
Silicon Carbide	374,891	45%	349.2



Bauxite operations, Shanxi, China

* world share combined; ** estimate Source: China Customs; ITC

China's refractory mineral supply

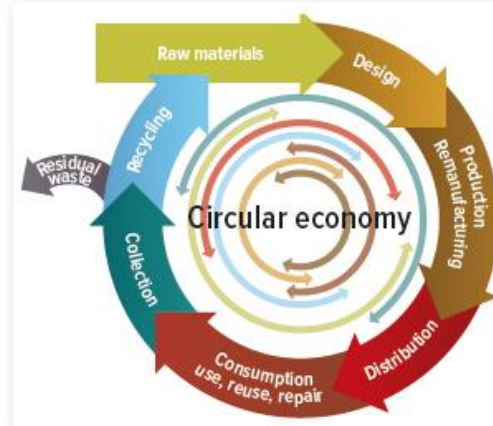
- Are we witnessing a transformation in mineral supply expectations and trends from China?
- If so why? And should we expect more change in the future?
- When can we expect some stability, if at all, and for which minerals?
- How will the evolving refractory markets & requirements impact mineral selection and sourcing? For both China & world markets?
- Will the emerging EV LiB market demand impact graphite availability?
- What alternative sourcing strategies can be pursued by consumers?



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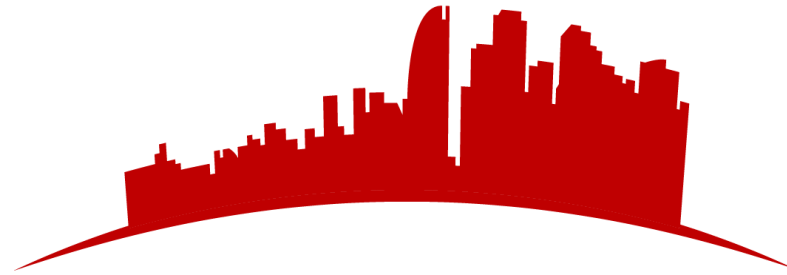
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