

XII EUROPEAN CONGRESS OF REFRACTORY RAW MATERIALS, MACHINERY & INSTALLATION

Meliá Lebreros, Seville
13-14 March 2024

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Welcome to Seville!





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Vesuvius
Worldwide Industrial Trading
Zaporizhzia Abrasive Plant

Thanks in organising such a valuable event. It provided a comprehensive platform to discuss the ever-evolving landscape of critical raw materials, volatile market conditions, reliance on Chinese raw materials and the impact of geopolitical tensions on the supply chain

Laxmi Thorat, Director, Minchem Impex FZCO, UAE

Thank you for the great organisation and kind hospitality. The Congress concluded with a spectacular raw materials panel discussion. I definitely recommend my colleagues to attend this conference next time.

Daria Vitrova, Zaporizhzia Abrasive Plant, Advisor to the CEO, Ukraine

We are lucky to have your support, this event was a success with people worldwide.

Eudald Parera, Marketing Manager, Keiron Chemicals sl, Spain

I had the opportunity to learn about the European Refractory market alongside the major refractory producers and raw materials suppliers. Outstanding organisation.

Marcio Lario, Founder & Board Member, Bautek Minerals Industries, Brazil

Thank you again for inviting me to this event, which was well attended and organised.

Vincent Couty, Vice President Refractory Producers, Imerys, France

Congratulations for a very well managed and run Congress! I did enjoy the presentations and the networking both days.

Miguel J. Galindo, CEO, Galesk Consultancy SLU, Spain

Good mix of market, technology and general topics as well as types of raw materials

Daniela Gavagnin, RHI Magnesita, Head of Pioneer Research, Austria

PROGRAMME

THURSDAY 14 MARCH

08.00 **Registration**

09.00 **Opening Remarks & Introduction**

Ismene Clarke, Director, & Mike O'Driscoll, Director,
IMFORMED, UK

09.15 **Welcome Address & Spanish Production Statistics**

Julio Mazorra Folguera, President, ANFRE, & Antón Sala,
General Manager, Refractarios Sala, Spain

09.30 **Developing sustainable cement-free magnesia
castables**

Ingrid Mikanovic, Technical Marketing Manager,
Refractories & Ceramics, Elkem GmbH, Germany

10.00 **Graphite from Madagascar**

Richard Song, CEO, Etablissements Gallois SA, Madagascar

10.30 **ECO-TAB® alumina refractory aggregate for steel
ladle lining**

VIDEO

Sebastian Klaus, Technical Manager Europe, Almatiss
GmbH, Germany

PROGRAMME

THURSDAY 14 MARCH (CONTINUED)

11.00 COFFEE

- 12.00 **Andalusite supply & demand for refractories**
Vincent Couty, Vice President Refractory Producers,
Imerys, France
- 12.30 **Silicon carbide solutions for refractory applications**
J. Andres Pavony, Sales Manager Europe SIKA® TECH Fine
Ceramic Powders, Fiven ASA, Germany
- 13.00 **Magnesia supply overview**
Alison Saxby, Research Director, Project Blue, UK
- 13.30 **Status & outlook for mineral logistics**
Robert van Muiden, Managing Owner, RoBuLog -
Rotterdam Bulk Logistics, the Netherlands

14.00 LUNCH

THURSDAY 14 MARCH (CONTINUED)

- 15.15 **Decarbonisation with Life Cycle Thinking: Refractory raw materials & their relevance**
Antton Sala López, Founding Partner, Grunver Sostenibilidad SL /ANFRE, Spain
- 15.30 **Circular economy: demolishing used furnaces & recycling of refractories**
Werner Odreitz, CEO, REF Minerals GmbH, Germany
- 16.00 **Recycling of refractories: nice to do or a need to have? Circular Economy & the European Green Deal**
Franz Maier, Managing Director, MSM-Maier Solution Mining, Austria
- 16.30 **Raw Materials Panel Discussion**
Moderated by Mike O'Driscoll, INFORMED
- David Martínez, Keiron Chemicals
 - José Ramón Luna, Elkem Iberia
 - Iñigo García, Magnesitas Navarras
 - José María Domínguez, Refractarios Alfran
 - Óscar Marín, Traxys

17.30 END OF THE CONGRESS AND FINALE DRINKS RECEPTION



Refractory Minerals

Entering a new era of sourcing & supply



Grecian Magnesite, Yerakini, Greece



Loading big bags DBM, Bayuquan, Liaoning, China



Lining refractory bricks at Benxi Steel Group, Benxi, Liaoning, China



Refractory minerals supply chain



- Dead burned magnesia
- Fused magnesia
- Dead burned dolomite
- Chromite
- Sintered/fused spinel
- Olivine
- Calcined alumina
- Fused alumina
- Calcined bauxite
- Sintered/fused mullite
- Andalusite, sillimanite, kyanite
- Refractory clays
- Pyrophyllite
- Quartzite, silica sand
- Fused silica
- Zircon
- Zirconia
- Silicon carbide
- Graphite
- Diatomite
- Perlite
- Vermiculite

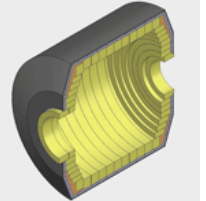
Bricks



Monolithics



Precast parts



Steel (58-70%)

10-15kg/t
Ladle
70t 1 month

Nonferrous metal

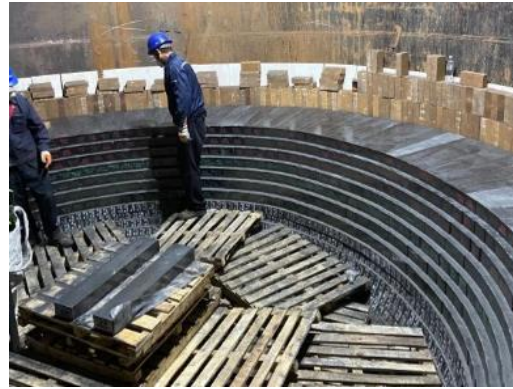
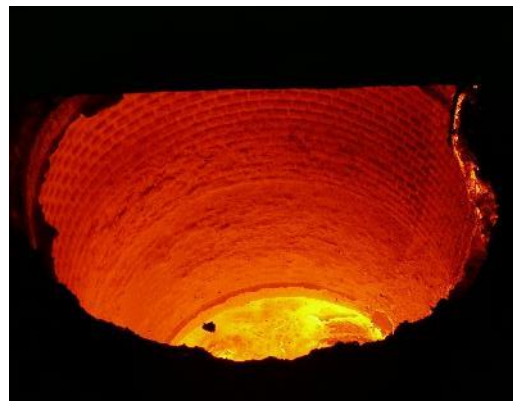
3kg/t
Copper kiln
150t 3 months

Cement

1kg/t
Rotary kiln
250t 10 months

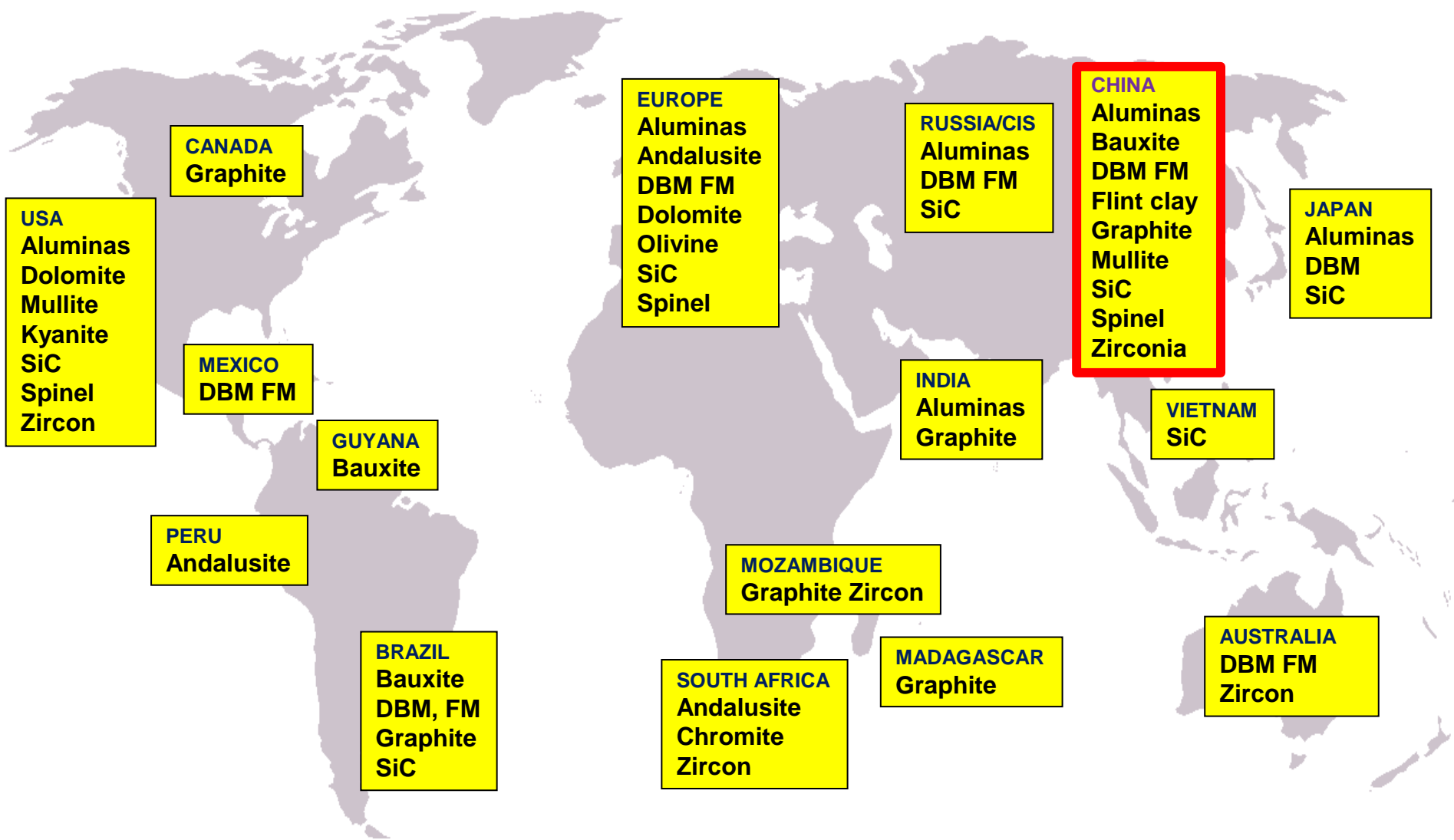
Glass

Melt furnace
4kg/t
500-8,500t 10 yr



Refractory minerals global supply overview

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

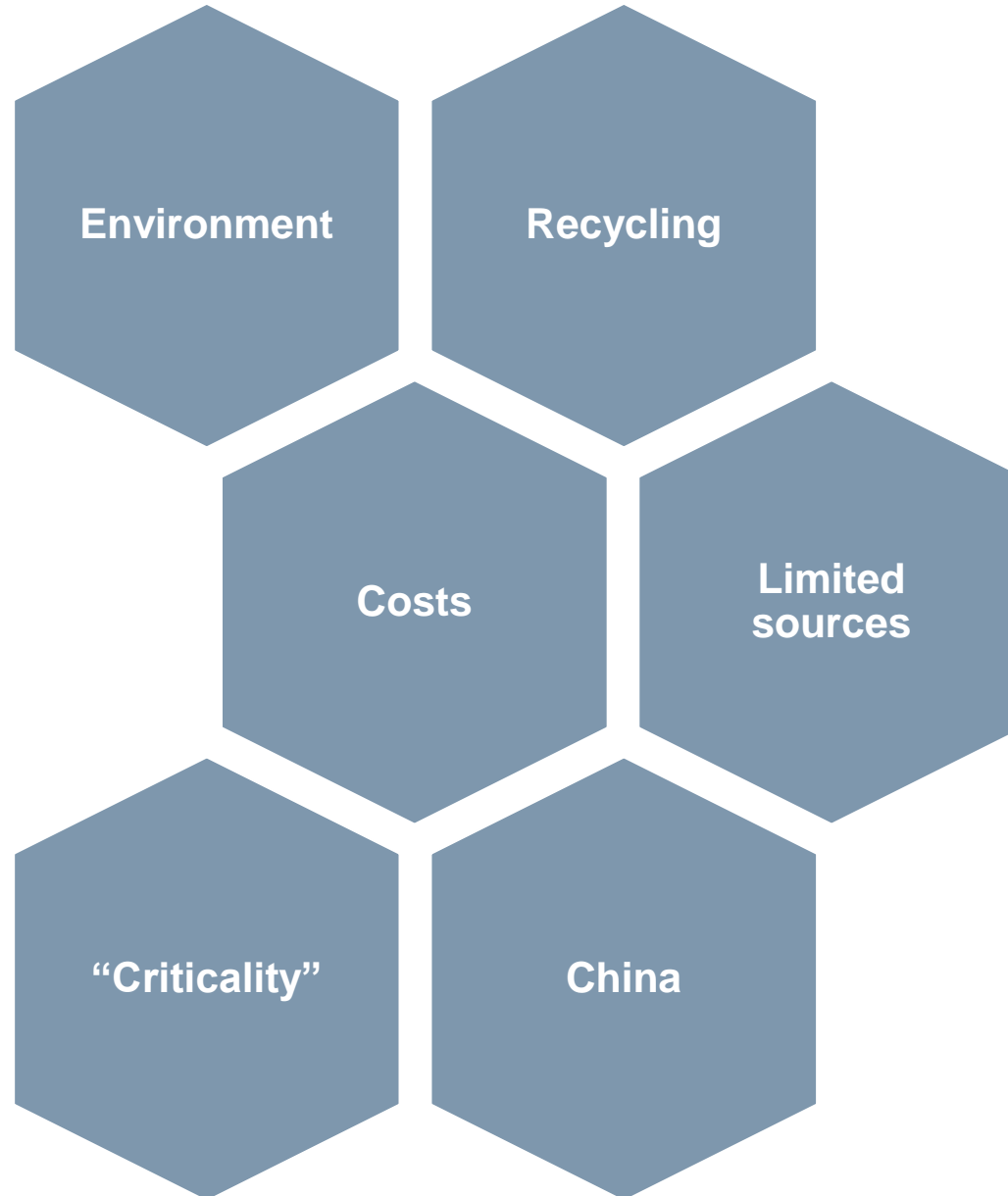


Mineral	Total no. country sources*
DBM	21
Silicon carbide	20
Fused alumina	14
Fused magnesia	12
Pyrophyllite	11
Dolomite	9
Graphite	9
Zircon	9
Aluminas	8
Kyanite	5
Andalusite	5
Bauxite	4
Chromite	4

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

Entering a new era of refractory mineral sourcing & supply

Industry shaped by primary influencing factors



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Sponsorship/Exhibit/Registration Enquiries

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Programme/Speaker Enquiries

Mike O'Driscoll mike@imformed.com | T: +44 (0)7985 986 255



- **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**
 - **Salt**

MINERAL RECYCLING FORUM 2024

Hilton Imperial Dubrovnik, 22-24 April 2024

Secondary raw material sources, supply, processing, and markets

Lead & Day 1 Reception Sponsor **Glenn Hunter & Associates**

Welcome Reception Sponsor

Exhibitor



Latest trends in refractory recycling

Speakers from:

- HarbisonWalker International
- RHI Magnesita
- MIRECO
- REF Minerals
- Glenn Hunter & Associates
- TRL Krosaki Ltd
- Shinagawa Refractories
- Befesa Aluminio SL
- Ceram Austria
- Jai Balajee Trading Co.
- Lhoist
- Euromines

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MAGFORUM 2024

Magnesium Minerals & Markets Conference

The Pomegranate Wellness Spa Hotel, Halkidiki — 13-15 May 2024

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Exhibitors

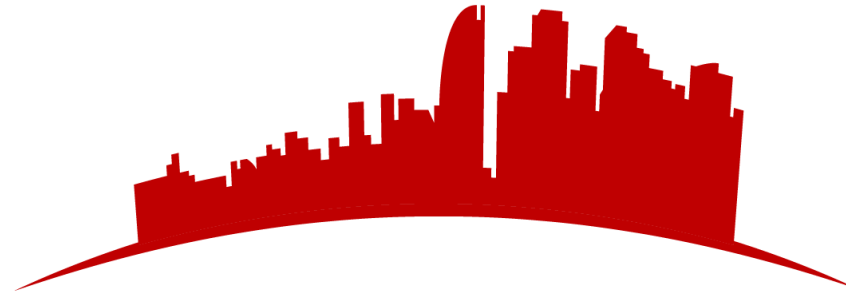


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- Keynote panel discussion
- Themed Roundtable networking
- Magnesia supply & demand
- Other MgO sources
- Refractory market outlook
- Speciality markets
- Processing developments
- Decarbonisation

CHINA REFRACTORY MINERALS FORUM 2024

InterContinental Dalian
21-23 October 2024



Field trip to Haicheng Magnesite, Thursday 24 October 2024



CALL FOR PAPERS!

Topics to include:

- Market Outlook
- Influencing Factors
- Procurement
- Logistics
- Recycling
- Aluminas
- Bauxite
- Fused Alumina
- Dead Burned Magnesia
- Fused Magnesia
- Spinel
- Calcium Aluminate Cements
- Graphite
- Mullite

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BARITE & OILFIELD MINERALS **FORUM** 2024

5-7 June 2024

The Royal Sonesta Hotel Houston Galleria



FLUORINE **FORUM** 2024

Shangri-La Ulaanbaatar
14-16 October 2024

FIELD TRIP: Mongolczechmetall, Chuluut Tsagaan Del



CHINA REFRACTORY MINERALS **FORUM** 2024

InterContinental Dalian

21-23 October 2024

FIELD TRIP: Haimag, Haicheng, Liaoning



SALT **FORUM** 2024

To be confirmed very soon

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

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

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Meliá Lebreros, Seville
13-14 March 2024

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Learn
Enjoy***