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MINERAL RECYCLING FORUM 2025



Pullman Cannes Mandelieu, 9-11 April 2025

Secondary raw material sources, supply, processing, and markets

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Magnesium Minerals & Markets Conference

Tivoli Ecoresort Praia do Forte Bahia

Salvador, 19-21 May 2025

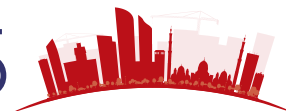
Field Trip to RHI Magnesita, Brumado, Thursday 22 May 2025

FLUORINE FORUM 2025

Grand Hotel Dino, Baveno,
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Maria Bernard

E: maria@imformed.com

T: +44 (0) 208 153 0035

Programme, Speakers

Mike O'Driscoll

E: mike@imformed.com

T: +44 (0)1372 450 679

M: +44 (0)7985 986 255



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E: maria@imformed.com
T: +44 (0) 208 153 0035

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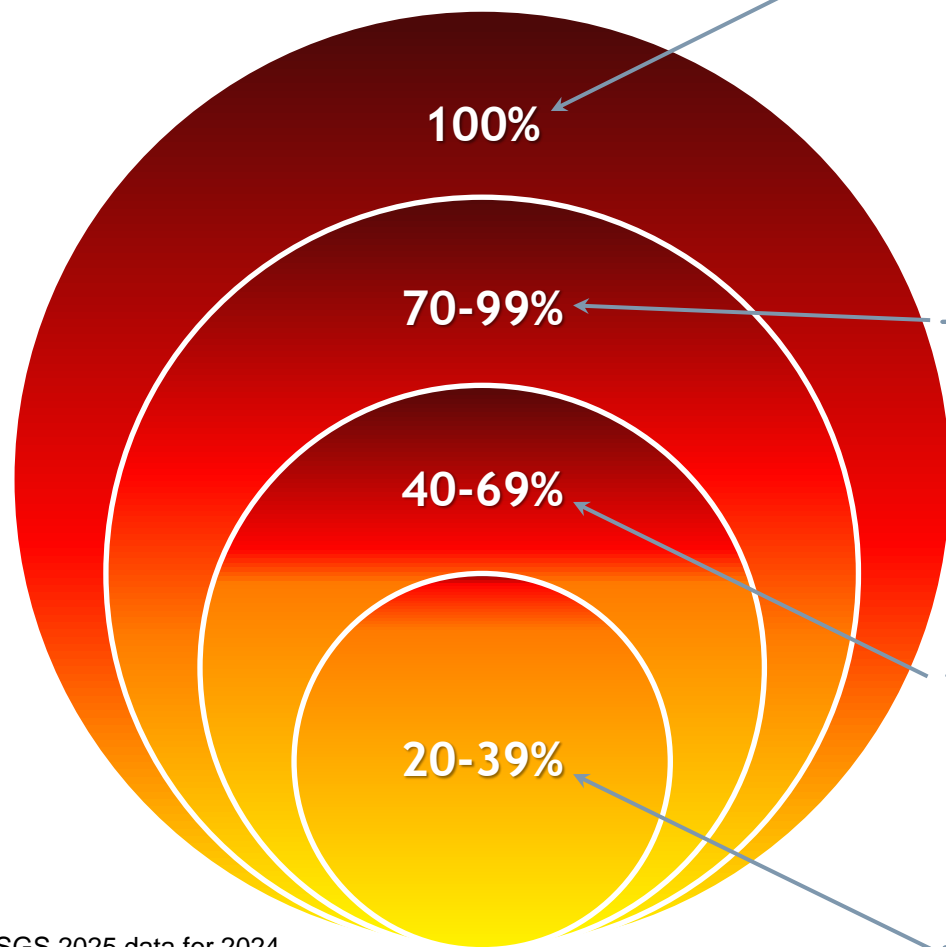
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US industrial mineral net import reliance 2024: tariff impacted minerals?

Mineral imports from Canada, Mexico, China highlighted

Overall

- 24 @ ≥50% import dependency (incl. 9 @ 100%)
- 8 @ 20-48% import dependency



Asbestos	Brazil, Russia
Bauxite (non-met)	CHINA, Guyana
Fluorspar	MEXICO, Vietnam, S. Africa, CHINA
Graphite (natural)	CHINA, CANADA, MEXICO, Mozambique
Mica (sheet)	CHINA, Brazil, India
Manganese	Gabon, S. Africa, Australia, Malaysia
Scandium	Japan, CHINA, Philippines
Strontium	MEXICO, Germany
Yttrium	CHINA, Germany

Fused alumina	>95%	CHINA, CANADA, Brazil, Austria
Neph. syenite	>95%	CANADA
Potash	93%	CANADA, Russia, Belarus, Israel
Iron oxide pig.	87%	CHINA, Germany, Brazil, CANADA
Titanium min.	86%	S.Africa, Madagascar, CANADA, Australia
Antimony	85%	CHINA, Belgium, India, Bolivia
Diamonds	81%	India, S. Africa, Russia, Australia
Rare earths	80%	CHINA, Malaysia, Japan, Estonia
Chromium	77%	South Africa, Kazakhstan, CANADA, Finland
Barite	>75%	India, CHINA, Morocco, MEXICO

Silicon carbide	69%	CHINA, Brazil, CANADA
Alumina	59%	Brazil, Jamaica, Australia, CANADA
Magnesia	52%	CHINA, Israel, Brazil, CANADA
Iodine	>50%	Chile, Japan
Lithium	>50%	Chile, Argentina
Garnet	48%	S. Africa, Australia, India, CHINA
Mica (scrap,flake)	41%	CHINA, CANADA, India, Finland

Vermiculite	34%	S.Africa, Brazil, Zimbabwe
Feldspar	33%	Turkey, MEXICO
Perlite	26%	Greece, CHINA
Bromine	<25%	Israel, Jordan, CHINA
Zircon	<25%	S.Africa, Australia, Senegal
Salt	24%	CANADA, Chile, MEXICO, Egypt

Source: adapted from USGS 2025 data for 2024
Major import sources 2020-23; US net export minerals excluded, eg. boron, clays, diatomite; and <20% net import reliance

Industrial minerals from Canada, China, Mexico consumed in the USA which have a >20% net import reliance to meet demand

Country under US import tariff	Industrial mineral	Critical mineral? ¹	US net import reliance ²	Total import volume 2024 ³ (000s tonnes)	Country import share ⁴	Primary market applications
CANADA	Alumina	N	59%	1,300	5%	abrasives; cement; ceramics; chemicals; flame retardants; refractories; water treatment
	Chromium	Y	77%	500	6%	chemicals; foundry; metallurgy; pigments; refractories
	Fused alumina	N	>95%	120	11%	abrasives; ceramics; refractories
	Graphite	Y	100%	60	13%	batteries; foundry; friction; metallurgy; refractories
	Iron oxide pigments	N	87%	180	7%	cement; construction; pigments
	Magnesia	N	52%	520	8%	agrimarkets; cement; ceramics; chemicals; construction; environment; flame retardants; metallurgy; refractories
	Mica (scrap, flake)	N	41%	20	35%	cement; oilfield; paint; pigments; plastics; rubber
	Nepheline syenite	N	>95%	470	99%	ceramics; glass; paint; pigments; plastics
	Potash	N	93%	6,100	79%	agrimarkets; chemicals
	Salt	N	24%	14,000	29%	agrimarkets; chemicals; environment; food/pharma
	Silicon carbide	Y	69%	110	3%	abrasives; ceramics; metallurgy; refractories
Ti-minerals	Y	86%	600	13%	chemicals; paints; pigments; plastics; paper	
CHINA	Antimony oxide	Y	85%	20	76%	batteries; ceramics; chemicals; flame retardants; glass
	Barite	Y	>75%	2,000	25%	chemicals; oilfield; paints; pigments
	Bauxite	N	100%	2,800	80%	abrasives; cement; chemicals; environment; metallurgy; oilfield; refractories
	Bromine	N	<25%	61	3%	agrimarkets; chemicals; environment; flame retardants; oilfield
	Fluorspar	Y	100%	440	8%	batteries; chemicals; electronics; metallurgy
	Fused alumina	N	>95%	120	64%	abrasives; ceramics; refractories
	Garnet	N	48%	100	9%	abrasives; filtration
	Graphite	Y	100%	60	43%	batteries; foundry; friction; metallurgy; refractories
	Iron oxide pigments	N	87%	180	43%	cement; construction; pigments
	Magnesia	N	52%	520	61%	agrimarkets; cement; ceramics; chemicals; construction; environment; flame retardants; metallurgy; refractories
	Mica (scrap, flake)	N	41%	20	40%	cement; oilfield; paint; pigments; plastics; rubber
	Mica (sheet)	N	100%	4	79%	cement; oilfield; paint; pigments; plastics; rubber
	Perlite	N	26%	180	4%	agrimarkets; construction; filtration; paints; pigments; plastics
	Rare earths	Y	80%	8	70%	ceramics; chemicals; electronics; glass; metallurgy
Scandium	Y	100%	n.a.	n.a.	chemicals; glass; metallurgy	
Silicon carbide	Y	69%	110	85%	abrasives; ceramics; metallurgy; refractories	
Yttrium	Y	100%	0.5	93%	batteries; ceramics; chemicals; electronics; glass; magnets; metallurgy	
MEXICO	Barite	Y	>75%	2,000	14%	chemicals; oilfield; paints; pigments
	Feldspar	N	33%	220	6%	ceramics; glass; paint; pigments; plastics
	Fluorspar	Y	100%	440	62%	batteries; chemicals; electronics; metallurgy
	Graphite	N	100%	60	13%	batteries; foundry; friction; metallurgy; refractories
	Salt	N	24%	14,000	14%	agrimarkets; chemicals; environment; food/pharma
	Strontium	N	100%	4	65%	ceramics; chemicals; glass; magnets; metallurgy; pigments

Source: based on USGS 2025 data for 2024 ; ¹ based on USGS Critical Minerals List 2022 & USDOE Critical Materials Assessment 2023; ² ie. overall US net import reliance for that mineral, specific import source countries can change annually, as can their respective share of US imports of that mineral; ³ ie. total volume of imports for US consumption of all grades (incl. for metallurgical uses) from all countries; ⁴ ie. average import share during 2020-2023; n.a. not available