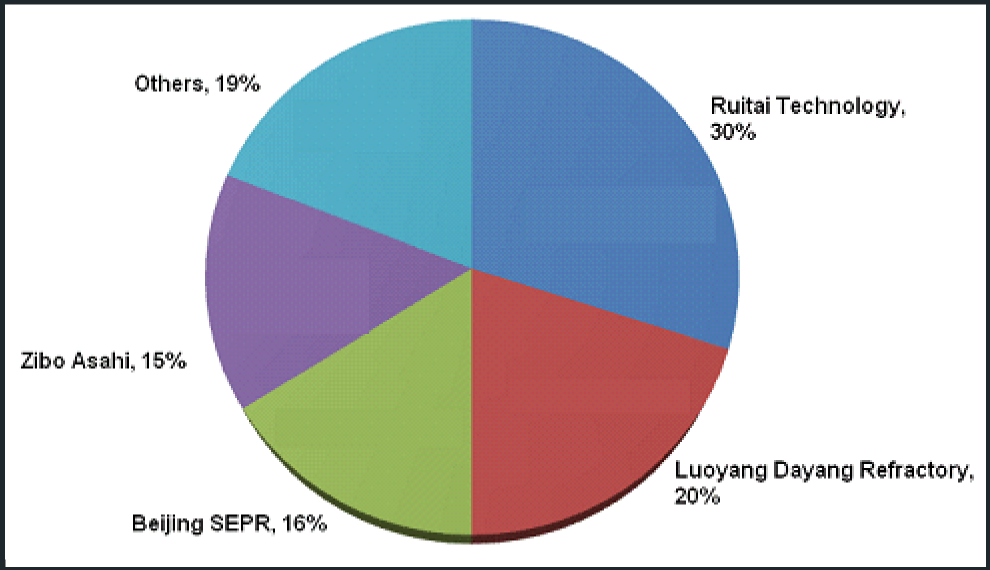
Global and China Refractory Material Industry Report, 2009-2010

Since 2000, China's refractory material industry has achieved rapid development driven by the brisk advancement of high-temperature industries like steel, building materials and nonferrous metals. In 2003, the output of refractory materials of China reached 14.77 million tons, and it rose to 32.43 million tons in 2006, while in 2007, China's output of refractory materials exceeded 50% of the world's total. Yet, the financial crisis in 2008 resulted in a slump in the output of refractory materials. The year of 2009 saw a slight recovery in output to 25.44 million tons, up 3% yr-on-yr.

This report briefly overviews the development status quo of global and China's refractory material industry, sheds light on the supply and demand of Chinese refractory material market. Moreover, it makes an in-depth analysis on the development, competition pattern and potential demand of four market segments including fusion-casting refractory materials, basic refractory materials, unshaped refractory materials and ceramic fiber in Chinese market.

In China, fusion-casting refractory materials are widely used in glass industry, representing 65% of refractories for glass. Nowadays, only 10-plus enterprises worldwide are capable of steadily producing fusion-casting refractory materials, including Europe SEPR and Japan's Asahi Glass. In China, there are only 4 such enterprises specialized in this field, i.e. Ruitai Technology, Luoyang Dayang Refractory, Beijing SEPR and Zibo Asahi.

Market Share of Chinese Manufacturers of Fusion-Casting Refractory Materials, 2009



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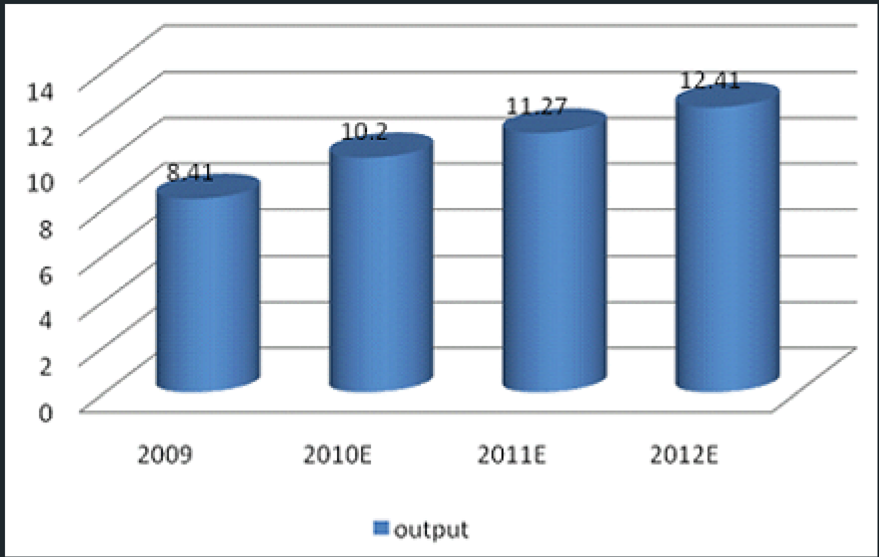
China has many enterprises involving in the production of basic refractory materials, among which Qinghua Refractories boasts the largest market scale. Qinghua Refractories mainly produces magnesia-chrome refractory materials with the annual output capacity of approximately 200,000 tons. Basic refractory materials get mainly used in cement kilns in China. With the increasing demand on environmental protection and energy conservation, the chrome-free basic refractories will become the mainstream in the market.

In 2009, the output of unshaped refractory materials in China touched 8.41 million tons, with a 33.1% share of total refractory materials. Yet in the developed countries, the figure has realized 50%, in particular, it was 63% in Japan. In terms of application, 70% unshaped refractory materials are applied in steel sector in China, meanwhile, unshaped refractories for cement kilns are under active promotion. Since unshaped refractory materials characterize high quality, high efficiency and energy saving, the government has released polices to encourage its application. Fueled by these polices, it is expected that China’s output of unshaped refractory materials will take 40% of China’s total output of refractories, or will reach about 10.2 million tons in 2010.

China's Output of Unshaped Refractory Materials, 2010-2012 (Unit: Million tons)



Source: ResearchinChina

Ceramic fiber industry of China has developed rapidly in recent years. In 2008, its output hit 400,000 tons, taking 47% of the world's total while the share jumped to 48% in 2009. Shandong Luyang Share Co., Ltd, the largest ceramic fiber manufacturer in China, is next only to Morgan Crucible and Allied Minerals in terms of annual output capacity (Luyang, 120,000 tons).

Also, the report analyzes the competition pattern of refractory materials in China, and focuses on the world's eight key refractory material enterprises including RHI, Vesuvius, Krosaki, Morgan Crucible and Saint-Gobain, and 12 Chinese refractory material manufacturers such as Puyang Refractories Group, Luyang Share Co., Ltd, Ruitai Technology, Beijing Lier High-temperature Materials Co., Ltd, and Qinghua Refractories.

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