Global and China Refractory Material Industry Report, 2010-2011

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This report

- **Analyzes the supply and demand of refractory market.**
- **Focuses on the market segments of fusion-casting refractory, basic refractory material, unshaped refractory material, and ceramic fiber.**
- **Highlights the operation of global and Chinese leading enterprises.**

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Abstract

Vigorously fueled by such high-temperature industries as steel, cement, glass, and nonferrous metal in recent years, the output of refractory materials in China climbed to 28.08 million tons in 2010 from 14.77 million tons in 2003, with the CAGR of 9.6%; hereinto, the energy-saving and eco-friendly unshaped refractory contributed more than 1/3. Meanwhile, the export volume of refractory products increased substantially from 827 kilotons in 2003 to 1792.8 kilotons in 2010, with the CAGR of 11.7%.

Steel industry, the largest consumption field of refractory materials, occupies over 65%. The demand of steel dedicated refractory is directly related to steel output. The per ton steel usually consumes less than 10kg refractory materials in foreign countries, while that in China turns out to be 20~25kg. The Development Policy of Refractory Industry shoots at the refractory consumption per ton steel less than 20kg in 2010 and shy of 15kg in 2020.

The necessary refractory materials for cement industry, the second largest consumption field of refractory materials, mainly cover basic refractory materials (magnesite brick, magnesite-chrome brick, magnesite-alumina brick, etc.), Al-Si refractory materials (high alumina brick, fireclay insulating brick, etc.), and heat insulation refractory materials. Wherein, magnesite-chrome brick is most commonly employed in cement kiln firing zone; nevertheless, chromium ion brings about serious pollution against high temperature, magnesite-chrome brick has therefore been gradually replaced by chrome-free refractory materials like dolomite brick and magnesia spinel brick in recent years.

Fusion-casting refractory is usually applied in glass industry and enjoys 58% share. At present, merely about 10 international companies including Saint-Gobain SEFPRO and Asahi Glass can steadily produce fusion-casting refractory and boast certain strength and influence.

The most representative enterprises in China consist of Ruitai Materials Technology Co., Ltd., Beijing SEPR Refractories Co., Ltd., Zibo Asahi Glass Alumina Materials Co., Ltd., and Luoyang Dayang Refractory Co., Ltd.

Apart from the supply and demand of refractory market, this report underlines not only the market segments of fusion-casting refractory, basic refractory material, unshaped refractory material, and ceramic fiber but the industrial competition pattern including regional pattern and enterprise pattern.

Refractory production bases have gradually taken shape in Henan, Shandong, Liaoning, and Shanxi, centering on the characteristics of various raw mateiral origins. In 2010, the output of the above mentioned four bases contributed 87.9% to the national total, of which, Henan ranked the first with approximately 50% share. Liaoning is abundant in magnesium ores and it produced 5.53 million tons of refractory in 2010; hereinto, magnesia refractory registered 5.45 million tons.

Along with the market improvement and development, competitive refractory enterprises have outshined themselves. Currently, Puyang Refractories Group Co., Ltd. is the biggest steel refractory manufacturer in China, with the market share of 2.5% in 2010.

As the largest fusion-casting refractory magnate in China, Ruitai Materials Technology Co., Ltd. has its products widely applied in glass kilns and initiated the exploration in refractory materials for cement industry in 2010.

Shandong Luyang Share Co., Ltd. is the largest manufacturer of ceramic fiber in China. Its capacity rested on 200 kilotons in 2010 when its Inner Mongolia base achieved outstanding performance and established eight production lines of ceramic fiber cotton carpet with the capacity of 40 kilotons.

Beijing Lier High-temperature Materials Co., Ltd. is the pioneer of turnkey contract on refractory materials for steel industry in China, and the turnkey contract business accounted for 70.12% of the total revenue in 2010.

Qinghua Refractories is the leading company in Chinese basic refractory market. In June 2010, its subordinated Taicang Qinghua Secondary Refractories Co., Ltd. set up 2 high-temperature tunnel kilns mainly for the production of such high-quality basic refractory materials as magnesia-calcium brick and sliding gate brick.

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