



Global and China Refractory Material Industry Report, 2011-2012

Jun. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include National Bureau of Statistics of China, The Association of China Refractories Industry etc.

Abstract

China is a major producer and exporter of refractory materials in the world. In recent years, driven by iron and steel, nonferrous metals, cement, glass and other downstream industries, China refractory material industry has witnessed rapid growth. From 2003-2011, China's refractory material output grew at an average annual growth rate of 9.0%; the export volume rose at an average annual growth rate of 11.3%.

Among refractory materials, unshaped refractory materials have been promoted vigorously because of simple production technology, less energy consumption, strong adaptability and other advantages. In 2011, the output of unshaped refractory materials was 11.171 million tons, accounting for 37.9% of China's total output, up 3.6 percentage points from 2009, but the proportion was still very low compared with over 50% in developed industrial countries.

In addition, chromium-free alkaline refractory materials, bio-soluble refractory ceramic fiber and other green and eco-friendly products have been developed and produced gradually.

For chromium-free alkaline refractory materials, Ruitai established an industrial base in 2008, and now it can produce 35,000 tons of high quality chrome-free alkaline refractory materials annually. In May 2011, Sinosteel Refractory Materials Co., Ltd. started building a high quality eco-friendly chromium-free alkaline refractory materials production line with an annual capacity of 150,000 tons.

As for bio-soluble refractory ceramic fiber, Luyang developed bio soluble eco-friendly magnesium silicate ceramic fiber independently in 2009. Lijin Huitong Fiber Materials Co., Ltd. commenced a bio soluble ceramic fiber project in 2010. In 2011, Morgan Kailong (Jingmen) Thermal Ceramics Co., Ltd. of Morgan Crucible began to produce biodegradable heat insulation fiber - SUPERWOOL.

The report not only studies the status quo, key products and the market of the industry, but also analyzes seven international companies as well as 19 key Chinese enterprises (Puyang Refractories, Shandong Luyang, Ruitai, Beijing Lier, etc.).

In recent years, the global refractory material industry has been experiencing mergers and acquisitions. RHI, Cookson, Morgan Crucible and other world-renowned refractory material manufacturers have implemented cross-border mergers and acquisitions.

Currently, RHI has established factories in Dalian, Liaoning Dashiqiao, Yingkou Bayuquan and Shandong. Besides, it has set up a trading company in Dalian.

In 1986, Vesuvius joined Cookson. With the powerful economic strength of the parent company, Vesuvius has established more than ten subsidiaries in China, including Vesuvius Advanced Ceramics (Suzhou) Co., Ltd. and Yingkou Bayuquan Refractory Materials Co., Ltd., Ansteel Vesuvius Refractory Materials Co., Ltd., Foseco Refractory Materials (Tianjin) Co., Ltd. and so on.

Morgan Crucible is one of the world's largest ceramic fiber enterprises. It has set up a number of ceramic fiber companies in China, including Morgan Kailong (Jingmen) Thermal Ceramics Co., Ltd., Morgan Thermal Ceramics (Shanghai) Co., Ltd. and so forth. In January 2011, the group acquired a Chinese graphite supplier - Changsha Hairong New Materials, and changed its name to Morgan AM&T Hairong.

Driven by the consolidation and reorganization boom in the global refractory material market, as well as large-scale reorganization and integration in steel and cement industries, China refractory material industry has also entered the integration stage, and representative enterprises include Puyang Refractories, Ruitai and Beijing Lier.

Puyang Refractories: In 2011, it acquired 100% stake of Haicheng LinLi Mining Co., Ltd. in March and 95% stake of Haicheng Huayin High-tech Material Co., Ltd. in September, and established a joint venture - Tibetan Puyang Refractories High-purity Magnesium Materials Co., Ltd. in August.

Ruitai: In 2011, the company set up Zhengzhou Ruitai Refractory Technology Co., Ltd., acquired and restructured Anhui Ningguo Kaiyuan Electric Wear-resistant Materials Co., Ltd.

Beijing Lier: In February 2011, the company set up Liaoning Lier High Temperature Materials Co., Ltd., and planned to build a 60,000 tons / year production line of high-quality refractory materials for secondary refining. In March, it cooperated with Baotou Steel to set up a joint venture - Baotou Steel Lier High Temperature Materials Co., Ltd. In July, it acquired Ma'anshan Kaiyuan New Material Technology Co., Ltd. for 73% stake.

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