Global and China Refractory Material Industry Report, 2013

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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 Company Reports, and National Bureau of Statistics of China etc.

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Abstract

Affected by the factors such as slowdown in growth rates of downstream sectors like iron and steel, building materials, and glass as well as the reduced demand of refractories for infrastructure construction, China's refractory materials production in 2012 fell 4.43% over the previous year to 28.1891 million tons, of which, magnesia bricks, magnesium carbon & alumina magnesia carbon, and siliceous brick dropped sharply, down 15.94%, 8.45% and 8.37% YoY respectively.

In terms of export in 2012, both volume and value of refractory raw materials fell down, but refractory products broke the 2-million-ton mark again, climbing 4.4% YoY to 2.0397 million tons; export price even increased by 7.08%.

With respect to the product, China has been promoting the development of high-quality energy-efficient unshaped refractories. In 2012, the proportion of unshaped refractories in the total refractories production there firstly exceeded 40%, but compared with industrially advanced countries, the proportion is still lower, the goal is to hit 60% in 2020.

In addition, R & D of chrome-free refractories is also the focus of industry development. So far, Ruitai Materials Technology, Zibo Luzhong Refractory, etc. in cement kiln refractories, Qinghua Refractories, Zhejiang Jinlei Refractories, etc. in refractories for AOD furnace, Luoyang Institute of Refractories Research (LIRR), Shangyu Zili Corp New Material Co., Ltd (Zili Corp), etc. in refractories for RH furnace have made many successful attempts, followed by vigorous promotion.

As far as enterprises are concerned, China through mergers and acquisitions has had a few competitive refractory companies such as Qinghua Refractories, Puyang Refractories, Ruitai Materials Technology, Beijing Lier High Temperature Materials, Luoyang Institute of Refractories Research, Shandong Refractories Group.

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As China's largest steel refractories company, **Puyang Refractories Group Co.,Ltd** has successively acquired and reorganized Kunming Iron and Steel Refractories, Shanghai Baoming Refractories Co. Ltd., Jiaozuo Bigger Refractories Co., Ltd. and so forth. In the first half of 2013, the company planned to acquire 100% equity in Zhengzhou Hua wei Refractories Co.Lt; the project is now being actively promoted. Once the acquisition comes through, the company will enter the "non-steel" refractory area.

In 2011, **Ruitai Materials Technology Co., Ltd.** acquired 100% stake in Ningguo Kaiyuan Electric Power Wear Resistant Materials Co., Ltd., and also established a joint venture named Zhengzhou Ruitai refractory Materials Technology Co., Ltd. with Henan Huobao Refractory Material Co., Ltd. In 2012, the company acquired 39.76% stake in Hunan Xianggang Yixing Refractory Materials Co., Ltd, and then 42.99% after capital increase in cash; in the same year, it invested RMB120 million in establishment of joint venture – Huadong Ruitai with Yixing Refractory Material Co., Ltd., holding 60% stake.

In December 2012, **Beijing Lier High Temperature Materials** finalized its mergers and acquisitions of Jinhong Mining and Liaoning Zhongxing Mining Group, with transaction amount of about RMB669 million. Jinhong Mining is mainly engaged in magnesite mining, possessing Wangguangchang magnesite mine in Mafeng Town, Haicheng City, Liaoning Province. Liaoning Zhongxing chiefly produces shaped refractory products and unshaped refractories, with annual production of 250,000 tons of shaped and unshaped series products.

According to the Opinions on Promoting the Healthy Development of Refractory Industry issued by the MIIT (Ministry of Industry and Information Technology) in February 2013, China will continue to promote joint reorganization and enhance industrial concentration in the future; form 2~3 internationally competitive enterprises and create a number of new industrialization demonstration bases, with industrial concentration of the top ten companies reaching 25% by 2015; up to 45% by 2020.

Furthermore, mergers and reorganizations among international refractory companies have never ceased, either; till now, leading players like Vesuvius, RHI, Magnesita, Krosaki-Harima have emerged. By the end of 2012, the world's top ten refractories enterprises had conducted operations in China.

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