Global and China Fluorite Industry Report, 2014-2016

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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.

Abstract

Of extensive use, fluorite is widely applied in fields of metallurgy, building materials, fluorine chemical industry, etc. In 2013, global fluorite reserves attained about 240 million tons, mainly distributed in a few countries like South Africa, Mexico, China and Mongolia, wherein China's fluorite reserves accounted for about 10% of the world's total.

China is the uppermost fluorite producing country in the world with fluorite output approximating 4.3 million tons in 2013, accounting for 64% of the world's total. However, due to the overquick exploration, fluorite reserves in China become increasingly deficient. Thus the government takes active measures to protect fluorite resources, including execution of fluorite exploration volume limit and industry entry. Especially, after Ministry of Industry and Information Technology released two batches of production line lists in conformity with Fluorite Industry Access Standards successively in 2012 and 2013, fluorite output in China had presented a downward trend. It is estimated that China's fluorite output will slip to 2.85 million tons in 2016, proportion thereof down to 44.3% or so of the global total.

Against the background of a predicted decreasing fluorite output, China's fluorite demand will mainly count on fluorite import and technology of fluorine extraction from phosphate. Fluorite equivalent in phosphate ore (by calcium fluoride) in China reached 265.8 million tons, equal to 11 times current fluorite reserves in China, which provides a sound material basis for China's fluorite substitution. However, it still takes time to realize large-scale fluorite substitution due to immature production process of fluorine extraction from phosphate.

Multiple fluorite enterprises in the world are strengthening their integration of upstream and downstream industry chain of fluorite resources for achieving higher added value of products, and avoiding unfavorable price influence of fluorite market, etc.

Mexichem is an enterprise with comparatively abundant fluorite resource reverses, fluorite capacity thereof in 2013 reaching at least 1,348 kt/a. Currently, it is devoted to production of Fluoropolymers and Fluoroelastomers with higher added value.

As the second largest acid fluorite producer, Minersa achieves acid fluorite capacity of around 380 kt/a. Via its subsidiary Derivados del Flúor (DDF), Minersa has got through fluorite-fluorine chemical industry chain. DDF is the top producer and distributor of European inorganic fluorides and its products are extensively utilized in areas of refrigerant, air-conditioning system, chemical building, etc.

Main fluorite manufacturers in China include Centralfluor Industries Group, Inc., Zhejiang Wuyi Shenlong Flotation Co., Ltd., etc., and fluorite capacity of them respectively attains 550 kt/a and 420 kt/a. Whereas, comparatively speaking, China's fluorite enterprises are big but not strong and poor in downstream industry extension. While enterprises oriented to fluorine chemical industry, such as Sinochem Lantian Co., Ltd., Zhejiang Juhua Co., Ltd., Do-Fluoride Chemicals Co., Ltd., etc., accelerate improving fluorite-fluorine chemical industry chain layout. Taking Do-Fluoride Chemicals Co., Ltd. as an example, despite of the small fluorite capacity of only 55kt/a, the company has completed its "fluorite-lithium hexafluorophosphate-lithium ion battery" industry chain layout and become one of the major suppliers of lithium hexafluorophosphate (capacity of 2,200 t/a) in the world.

The report includes the following aspects:

※ Global fluorite reserves, supply and demand analysis;

※ Reserves, competition pattern, supply & demand, import & export, and industry policies in China fluorite industry;

※ Influence of fluorite downstream market segments (such as building materials, fluorine chemical, iron and steel industry) on fluorite development;

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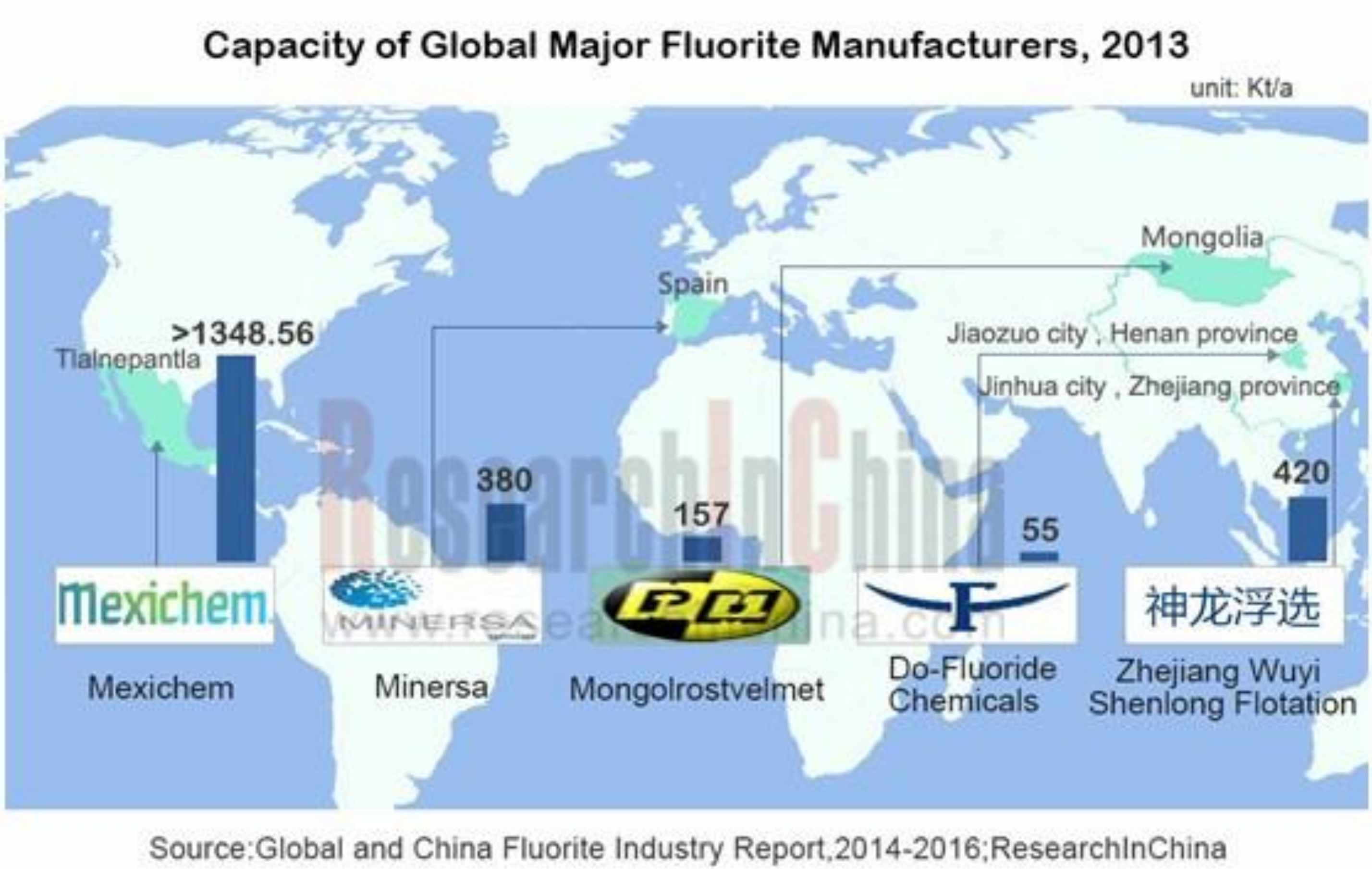
Capacity of Global Major Fluorite Manufacturers, 2013
unit: Kt/a
Mongolia
Spain
Jiaozuo city , Henan province
Jinhua city , Zhejiang province
Tlalnepantla
>1348.56
380
157
55
420
Mexichem
神龙浮选
Mexichem
Minersa
MongolrostveImet
Do-Fluoride Chemicals
Zhejiang Wuyi Shenlong Flotation
Source:Global and China Fluorite Industry Report,2014-2016;ResearchInChina

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