



Global and China Refractory Material Industry Report, 2014-2016

Sep. 2014

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

Refractory material is one of the indispensable materials in such high-temperature industries as iron and steel, building materials, chemicals, nonferrous metals, etc. Over 70% of refractory materials worldwide are applied in iron and steel smelting, 17% in building material industry and 4% in chemical industry.

Now, China is the largest producer and exporter of refractory materials around the globe. In 2013, China's refractory material output hit 28.189 million tons, sweeping more than 66% of the world's total; export volume topped 1.769 million tons, 51.7 times the import volume.

Despite the global leading position, Chinese refractory materials have been confronted with the prominent problem of overcapacity in recent years. Additionally, subject to growth slowdown in downstream sectors, the falling demand and other factors, market competition intensifies. Enterprises in the field received reduced orders and saw sales volume in decline, some companies even in the red.

According to statistics of The Association of China Refractories Industry (ACRI), in 2013, 59 key refractory material companies in China posted a year-on-year rise of 3.19% in refractory material output and

In the future, Chinese refractory material industry will enter a range of lower growth and may even experience some slight decrease. It is projected that during 2014-2016, Chinese refractory material output will register an AAGR of around 3.8%.

Against the sluggish market, companies at home and abroad have made breakthroughs in various ways, in which merging and reorganization becomes an edge tool in improving market concentration.

RHI is the largest refractory material company with 33 plants in the world, 4 of which are located in China, capable of producing 1.7 million tons of refractory materials annually. In 2013, RHI gained 69.6% equity of Orient Refractories Ltd. via two successive acquisitions; in 2014, RHI planned to take over one raw material plant in Erzurum, Turkey of Cihan Group and the mining right.

Vesuvius was once acquired by Cookson Group in 1986 and got separated from it at the end of 2012 and listed in London Stock Exchange. 2013 witnessed Vesuvius achieve revenue of GBP1.41 billion, in which GBP460 million came from refractory materials.

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 2013, Puyang Refractories gained 100% equity of Zhengzhou Huawei Refractories Co., Ltd. and in 2014 it planned to obtain 100% stake of Maanshan Yushan Metallurgical New Materials Co., Ltd. and 100% stake of Zhengzhou Huite Refractory Material Co., Ltd. via merger and acquisition.

Shandong Luyang Share Co., Ltd. brought in the overseas strategic investor – Unifrax Asia-Pacific Holding Limited, and gained 100% stake of Unifrax (Suzhou) in Aug. 2014.

Beijing Lier High-temperature Materials Co., Ltd. finalized its mergers and acquisitions of Liaoning Jinhong Mining and Liaoning Zhongxing Mining in 2013 and planned to spend RMB61.39 million in acquiring 100% equity of Shanghai Xintaishan High-temperature Engineering Materials Co., Ltd. (held by Shanxi Xixiaoping Refractories Co., Ltd.) in 2014.

M&A Events of Major Refractory Material Enterprises Worldwide, 2012-2014



Source: Global and China Refractory Material Industry Report, 2014-2016; ResearchInChina

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Global and China Refractory Material Industry Report, 2014-2016 mainly analyzes the followings:

- Development of global refractory material industry;
- Policy and industry environment of Chinese refractory material industry;
- Market supply & demand, competitive landscape, etc. of Chinese refractory material market;
- Development and major companies of refractory product segments such as basic refractory materials, unshaped refractory materials, ceramic fiber, etc.
- Upstream/downstream refractory material market analysis;
- Operation and refractory material business analysis of 7 key refractory material companies in the world and 8 ones in China.

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