

==== MATERIALS TECHNOLOGY ====

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A new in-depth Market Report on the Refractories Industry....

EUROPEAN AND INTERNATIONAL REFRACTORIES INDUSTRY: A MARKET / TECHNOLOGY REPORT

By John Briggs

ISBN 1 871677 57 2 (Published November 2007)

The report provides information on:

- Production, consumption, imports and exports of monolithic refractories by major country
- Production, consumption, imports and exports of refractory bricks and shapes by major country
- Growth prospects for refractories by type, material and geographical area
- Production, consumption, imports and exports of refractory raw materials (magnesite, alumina, andalusite, bauxite, silicon carbide, graphite, zirconia, dolomite, chamotte, etc.)
- Review of major end-user markets, including iron & steel production, cement, glass, ceramics, foundries, non-ferrous metals, incinerators, power production; their relative importance in different countries
- Data on trends in the specific consumption of refractories per tonne of steel by process in integrated plants and in electric-arc plants
- Data on trends in the specific consumption of refractories in the cement, non-ferrous metals and glass industries
- Refractory fibre and kiln furniture markets by product, country and supplier
- Survey of refractories in Europe by major country, covering production, trade and consumption
- Review of technological developments and their impact on the demand for refractories
- Review of China and India's role in the contemporary and future markets for refractories
- Profiles of major multinational and European-based refractories and raw materials producers: their size, market share and product range
- Over 500 A4 pages and over 400 tables

AVAILABLE NOW – The “European and International Refractories Industry: A Market / Technology Report” is a newly-published in-depth study of the current position and future prospects for the refractories industry, providing comprehensive data on production, consumption, imports/exports, growth rates, etc. for both Europe and the main geographic areas outside Europe: USA, China, India, Japan, Brazil, etc. Information concerning the activities of key multinational and European-based refractories companies is also provided. In addition, the raw materials supply sector and the impact that developments in refractory materials are having on the market are analysed in detail, as are the end-user industries that consume refractories.

Over 500 pages long, this fifth edition of the report updates and extends the information presented in the fourth edition (published in 2004).

Total consumption of refractories within the European Union (defined in the report as the 25 EU countries as of 2006) was about 4 million tonnes in 2006, with a corresponding value of around €2.6 billion. Of this total, just over 1.6 million tonnes (40%) was monolithic or unshaped refractories and slightly less than 2.4 million tonnes (60%) was refractory bricks and shapes. Germany was the largest consumer in the region, with about 19% of the total, followed by Italy and Spain with 14% and 13% respectively, the UK and France with 8%, Poland with 7%, Austria with 5%, and the rest of the EU25 with approximately 26%. Spain's share in terms of both production and consumption has grown strongly in recent years, reflecting developments in the user industries in the region.

Between 2007-2010, the market for refractory products in the European Union will grow at approximately 2% a year by value, reaching about €2.8 billion by the end of the period. There will be strong growth in Eastern Europe, particularly in those countries that are new members of the EU. Overall growth in the markets for refractory products in terms of volume will be in the order of 2.2% a year for the EU generally, to reach 4.36 million tonnes by 2010. Growth in non-EU countries within Eastern Europe, including Russia, will be even higher than that of Eastern Europe countries within the EU, at around 4% a year, reaching over 2.5 million tonnes by 2010.

Total production of refractories in the EU25 countries increased by an annual average of about 0.8% a year by weight between 2002 and 2006. The region now produces 5.3 million tonnes of refractory products, valued at approximately €3.4 billion; this is 1.3 million tonnes more than it actually consumes, and therefore the EU is a net exporter. By comparison, the production of refractories in the USA was approximately 2.2 million tonnes in 2006, valued at \$1.87 billion (€1.46 billion); in Japan, production was 1.1 million tonnes.

Iron and steel production is responsible for about 55% of the total demand for refractories: therefore, the profitability of the refractories industry as a whole is strongly influenced by steel production levels and steel plant investments. Overall growth in steel production in Europe (EU) for the period 2007-2010 is expected to average 2.5% a year, with high growth in 2007 and less towards the end of this period. East European steel production will continue to show healthy growth of over 4% a year in this period:

Europe is self-sufficient in only a few refractory raw materials, so there is a substantial requirement for imports of key materials. China has been a major supplier of many relatively inexpensive refractory raw materials. However, increasing demand from China's own end-user industries has restricted exports of several important refractory raw materials. This situation has led to shortages in some cases and consequent price increases. Increasing oil prices have also negatively impacted prices for raw materials.

Over recent years there has been considerable consolidation within the refractories industry. The two largest refractories groups, RHI (10% share of the worldwide market) and Vesuvius (8% share) have both made several notable acquisitions. Further mergers are expected in the near future. In addition, private equity investment in the sector is increasing in significance.

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- ESK-SiC GmbH; Elkem A/S
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- Saint-Gobain; Sanac SpA; Sardamag SpA; Schunk Ingenieurkeramik GmbH; SGL Carbon AG; Skamol A/S; Slovomag AS; Steuler Industiewerke GmbH; Superior Graphite Co
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