

# Mining Chemicals - A Global Market Overview

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## Abstracts

The processes involved in mining depend to a large extent on mining chemicals for improving productivity and efficiency. The global mining industry is confronting the challenge of low productivity as a consequence of depleting reserves of high quality ore grades, which has resulted in exploiting deposits that lie deeper in the earth's crust. This procedure is marked by complex extraction processes that necessitate using advanced mining chemicals for providing assistance in extracting and processing ores of low quality. The complexity in extracting ore deposits of lower grade has led to the generation of an increasing demand for high quality chemical solutions.

Mining commodity prices have been witnessing a downward spiral in recent times, with investment cutbacks and increasing cost of production further compounding the issue. Situations such as these demand increasing mining productivity using prudent means. The requirement for superior quality and technologically advanced mining chemicals is also being dictated by high energy costs expended in deeper mining and processing methods. Demand for specialized chemicals has been growing due to the criticality of improving metal recovery from mining operations.

Worldwide market for mining chemical types explored in this study includes Collectors, Flocculants, Flotation Chemicals/Frothers, Grinding Aids, Solvent Extractants and Others. The report also discusses the application areas of mining chemicals comprising Explosives & Drilling, Mineral Processing, Water & Wastewater Treatment and Other Applications. The global markets for the above mentioned chemicals types and application areas are analyzed in terms of USD. Global market for mining chemicals, estimated at US\$21.8 billion in 2015, forecast at US\$23.2 billion in 2016 and further expected to maintain a CAGR of 6.6% between 2014 and 2020 to reach a projected US\$30.1 billion by 2020.

The report reviews, analyses and projects the mining chemicals market for the period

2010-2020 globally and the regional markets including North America, Europe, Asia-Pacific, Latin America and Middle East & Africa. The regional markets further analyzed for 14 independent countries across North America – The United States, Canada and Mexico; Europe – Germany, Spain, Russia and Ukraine; Asia-Pacific – Australia, China and India; Latin America – Argentina, Brazil and Chile; and Middle East & Africa – South Africa.

This 500 page global market research report includes 292 charts (includes a data table and graphical representation for each chart), supported with meaningful and easy to understand graphical presentation, of market numbers. This report profiles 42 key global players and 58 major players across North America – 31; Europe – 11; Asia-Pacific – 7; Latin America – 1, and Middle East & Africa – 8. The research also provides the listing of the companies engaged in manufacturing and supply of Mining Chemicals. The global list of companies covers the address, contact numbers and the website addresses of 60 companies.

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Akzonobel NV  
Arizona Chemical Company, LLC  
Arrmaz Custom Chemicals, Inc.  
Ashland, Inc.  
Austin Powder Company  
Axis House  
BASF SE  
Beijing Hengju Chemical Group Corporation  
Celanese Corporation  
Chevron Phillips Chemical Company  
Clariant AG  
Coogee Chemicals Pty Ltd  
CP Kelco  
Cyanco Corporation  
Cytec Industries, Inc.  
The Dow Chemical Company  
Dupont (EI) De Nemours

Ekof Mining & Water Solution GmbH  
Exxon Mobil Corporation  
FMC Corporation  
General Electric Company  
Huntsman Corporation  
Kemira OYJ  
Mathiesen Corporation  
Maxam Australia Pty Ltd  
Minerals Technologies Inc.  
Nalco Holding Company  
Nasaco International LLC  
Orica Limited  
PQ Corporation  
Quaker Chemical Corporation  
Royal Dutch Shell Plc  
Sanyo Chemical Industries, Ltd.  
Sasol Limited  
SNF Floerger  
Tronox Limited  
Wego Chemical & Mineral Corp.  
Wyo-Ben, Inc.  
Zinkan Enterprises Inc.

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Launch of One-Stop Shop for Mining and Water Treatment Chemicals by Kemcore  
FMC Corporation's Alkali Chemicals Business Acquired by Tronox  
Demonstration of AkzoNobel's Lilaflo 628M Flocculating Collectors at the X CIS Congress of the Mineral Processing Engineers  
Kemira's New Global Oil & Mining Headquarters in Houston  
AkzoNobel Showcased New Three-Component Anionic Collector for Phosphate Ore Flotation at IMPC 2014 in Chile  
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Oil & Mining Businesses of Hycem Acquired by SNF Group  
Shell Became the First Company to Provide Gas-based Fluids and Solvents for Chemicals Industry

Broadening of BASF's Cork site to Enhance the Manufacturing Capacity of LIX Solvent Extractants

Demonstration of AkzoNobel's Optimized Flotation Collectors and Technologies in the 15th Brazilian Symposium on Iron Ore

Clariant to Broaden its Presence in the Global Mining Industry

Separation of Orica's Chemicals Business from its Core Mining Services Business

Synchronic Renaming and Acquisition of Ashland Water Technologies by CD&R

Establishment of Cytec's Novel Mining Chemicals Facility in Chile

Cytec Presents a Paper Titled "Change in Extractant Formulation in Minera Franke" at Hydroprocess 2014 in Chile

AECI Purchased Clariant Water Treatment Business

Cytec Showcases New Product for Rare Earth Separations at ALTA 2014 in Australia

AkzoNobel's Optimized Range of Flotation Reagents, Collectors and Technologies for Exhibition at the 1st International Forum "Flotation Reagents" in Russia

AECI Plans for Four Large Acquisitions to Enhance Annual Sales in Growing Markets

Lixivia's New Technology Enhances the Recovery of Copper Sulfate

Global Debut of BASF's New Ultra-high Molecular Weight Cationic Powder Flocculant Range with Zetag ULTRA

Cyanco and Nowata Joined Forces for Sodium Cyanide Distribution in Africa

Raise in the Price of AkzoNobel Surface Chemistry Americas' Products

Display of Cytec's AERO EZ 2100 Chemical Enhancer at the International Heavy Minerals Conference in Visakapatanam

Cytec's AERO 7260 HFP reagent for Copper/Molybdenum separation Showcased at Flotation 2013 in Cape Town

Clariant's New R&D Center Established in Brazil

Establishment of New Global Headquarters for Clariant Oil and Mining Services in The Woodlands

MineREADY Launched by Zinkan Enterprises

Inauguration of BASF's New Technical Service Laboratory for Mining Solutions in Pudong

Elemental Minerals' Sintoukola Potash Project in the RoC Received Mining License

Integration of BASF's Water, Oilfield and Mining Solutions Businesses into a Single Global Business Unit

Opening of BASF's New Technical Laboratory for Mining in Johannesburg Based at MINTEK

New Mining Wastewater Treatment Process Developed by CSIRO to Remove Contaminants

BASF to Broaden its Footprint in the Asia Pacific Region

Cyanco Opened New Sodium Cyanide Plant in Alvin and Broadened its Winnemucca

## Facility

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Cheminova Partnered with ALCHEM

Unification of Dow's Mining and Oil & Gas Businesses

ArrMaz Custom Chemicals Purchased by Golden Gate Capital

Chevron's WWT Process Acquired by Bechtel

Display of Cytec's MAX HT Sodalite Scale Inhibitor Technology at Toxicology and Sustainable Molecular Design Conference

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  - ArrMaz Gulf Chemicals (Kingdom of Saudi Arabia)
  - Ashland, Inc.
  - Austin Powder Company
  - Celanese Corporation
  - Chevron Phillips Chemical Company
  - CP Kelco
  - Cyanco Corporation
  - Cytec Industries, Inc.
  - The Dow Chemical Company
  - Dupont (El) De Nemours
  - Dyno Nobel, Inc.
  - Exxon Mobil Corporation
  - FMC Corporation

Cheminova A/S (DENMARK)  
General Electric Company  
GE Water & Process Technologies (United States)  
Huntsman Corporation  
Hychem, Inc.  
Minerals Technologies Inc.  
Nalco Holding Company  
PQ Corporation  
Quaker Chemical Corporation (United States)  
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  - EKOF Mining & Water Solution GmbH (Germany)
  - Kemira OYJ (Finland)
  - Nasaco International LLC (Switzerland)
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Coogee Chemicals Pty Ltd (Australia)

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