

Global and China Fluorite Industry Report, 2014-2016

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Abstracts

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 reserves, 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;

Operation, fluorite business and development trends of six global and nine Chinese fluorite players.

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