Titanium Feedstock Trade Matrix 2013 – Released August 2014

TZ Minerals International (TZMI) has released its latest data publication on the titanium feedstock sector: Titanium Feedstock Trade Matrix 2013 - Published August 2014.


The Titanium Feedstock Trade Matrix is the 15th annual update of TZMI’s analysis of global trade in titanium feedstock. The format of the matrix and data have evolved during the years but has always been designed to allow year-to-year comparisons.

Global feedstock purchase for 2013 remained subdued as downstream pigment producers continued to work down inventories by keeping plant utilisations low. While overall pigment production was only down slightly year-on-year in 2013, trade flows among individual feedstock types were considerably different given the change in pricing levels. Feedstock purchases to the top seven pigment producers accounted for 71% of total purchases in 2013. Total feedstock offtake attributed to China as a whole is estimated at approximately 1.72 million TiO2 units, a large proportion of which was sulfate ilmenite.

The report is presented in the following sections:

- Review of 2013: summarises the main trends and other important issues which have arisen from the analysis of the trade data.
- Appendix A: contains the global trade matrix, which shows in a single table the main trade flows across the world by feedstock type.
- Appendix B: contains the trades between feedstock producers and customers, segmented by key producers.
- Appendix C: contains, for the major pigment producers, feedstock purchases from 2009 to 2013 by feedstock type.

The Titanium Feedstock Trade Matrix is the only publication in the world that links production with imports and consumption.

Key elements of the report include:

- Trade information which is qualified on a monthly basis and top-down and bottom-up analysis of supply and demand is performed by TZMI’s analysts.
- Consumption of feedstock segmented into major pigment customers and other end-use categories including titanium slag, synthetic rutile and titanium sponge.
- Feedstock purchases by major pigment producers, broken down by individual feedstock type.
- Overall inventory change at producer and consumer ends.
- Preliminary view of feedstock trade flows in 2014 and anticipated impact on global supply/demand balance.

The annually released Titanium Feedstock Trade Matrix is available now for A$4,300.
For information about Titanium Feedstock Trade Matrix or other TZMI data services please visit www.tzmi.com
*For Australian Subscribers – the price shown excludes GST.

About TZMI

TZ Minerals International (TZMI) is a global, independent consulting and publishing company with offices in Australia, China, the US and Africa. The strength of TZMI’s consulting services stems from extensive practical experience in the mineral sands, titanium dioxide and coatings industries and from a comprehensive database, which has been built up over many years.

TZMI has proven expertise gained from our consultants having many years of direct operating experience in the industry in chief executive, senior operational, analytical and marketing roles.

TZMI’s publications and data services support the consulting activities and ensure up-to-date, high quality and comprehensive data, analysis and information across the mineral sands, zircon and TiO2 pigment industries.

TZMI provides operational and technical expert advice on many areas including:

- Mergers and Acquisitions
- Market Assessments and industry analysis
- Due diligence
- Pre-feasibility studies incl. preliminary capital and operating cost estimation
- Competitive cost analysis and benchmarking
- Technical reviews and audits
- Resource assessments
- Physical separation test work
- Flowsheet development
- Customised data analysis and reporting

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