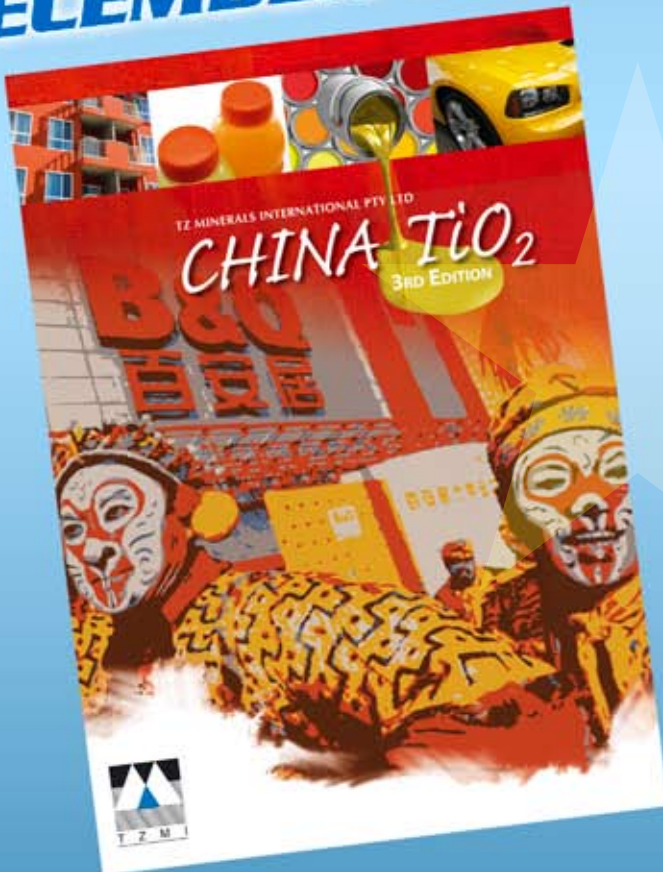




CHINA TiO₂ – 3rd Edition

**RELEASED
DECEMBER 2007**



The definitive reference publication for all industry participants seeking information about the titanium dioxide pigment industry in the world's fastest growing economy.

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CHINA TiO₂ – 3rd Edition

The study is a result of TZMI's greater involvement in China and the identified need for an authoritative review of the Chinese titanium dioxide pigment market.

The 2007 edition of China TiO₂, now in its third year, steps further into the Chinese TiO₂ sector. In the previous two editions much of the focus was placed on understanding the supply-side of the industry. In the 2007 edition, emphasis has been placed on understanding the drivers for the demand-side of the market. Far from slowing down, China is now becoming one of the most important segments in the global supply/ demand balance for titanium dioxide.

China's demand for titanium dioxide pigment is expected to exceed 1.3 million tonnes by 2012, a compound average growth rate (CAGR) of over 9% since 2006. Domestic supply has increased 4.4 times since 2000. There are now 12 operations producing more than 20,000 tpa. The largest producer, Shandong Jinhong is expected to be the 6th largest global sulfate operation in terms of output in 2007.



Chinese titanium dioxide industry participants are looking to forge closer links with international suppliers, with some contemplating stakes in off-shore feedstock operations to ensure security of supply.

The weakening US dollar is making Chinese imported product even cheaper for European producers, placing increased pressure on higher cost Western European manufacturers.

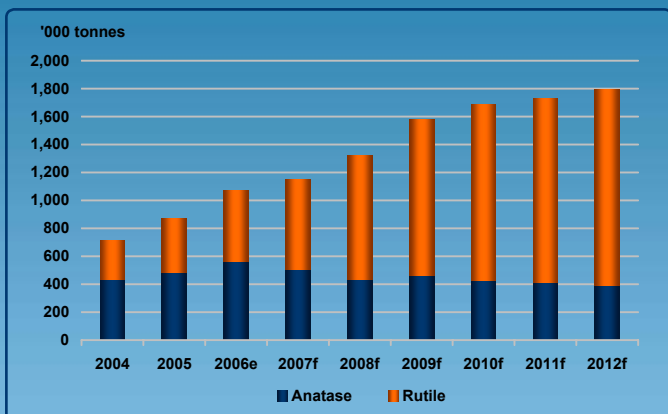
China is poised to cement itself as the largest TiO₂ consuming nation. This study provides an essential update to those industry participants that are evaluating the strategic path forward for their own businesses into the next decade.

This value driven study provides:

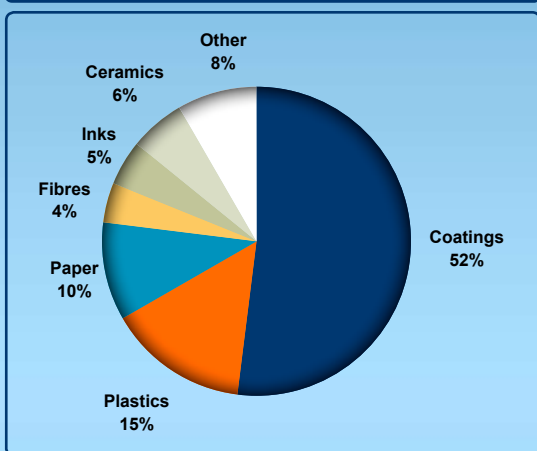
- A review of the Chinese titanium feedstock sector
- Summary of the TiO₂ pigment industry
- Technical perspectives of operations, quality and processing technologies
- Environmental aspects facing the industry
- Pigment producer profiles
- Strategic outlook to 2012
- Updates to the pricing, production and consumption information in our second 2006 publication, China TiO₂ – An Industry in Transition



Chinese domestic TiO₂ capacity forecast: 2004-2012



TiO₂ pigment demand by end-use sector: 2007



Key features

Detailed analysis and commentary covering:

- In depth review of demand for domestically produced and imported TiO₂, by quality type to 2012, with forecasts provided for the key end-use sectors including paint & coatings, plastics, paper, inks and synthetic fibers.
- In depth review of the current TiO₂ pigment manufacturing environment, the improvements made in the last 18 months and the outlook over the next five years.
- In depth review of the current titanium feedstocks supply situation from domestic operations, the widening supply gap and the opportunities available for international suppliers in the next 5 years.
- Analysis on the change political landscape and its likely impact on the domestic TiO₂ sector, with particular emphasis on the environment and financial subsidies.
- Detailed profiles on over 50 domestic pigment and feedstock operations.

About the publisher

TZ MINERALS INTERNATIONAL (TZMI) is an independent consulting and publishing company, established in 1994, with offices in Australia, Europe, South Africa and China. TZMI's principals and consulting personnel have several decades of cumulative experience from their involvement in the global mineral sands and TiO₂ pigment industries.

TZMI uses its experienced consultants to provide specialised consulting services, often confidentially, for the titanium minerals, zircon, titanium sponge and TiO₂ pigment industries as well as publishing specialised market studies and reports based on its comprehensive database of production and market data. The company employs research analysts who collect and analyse data, which includes up-to-date supply/demand models, technical data and operating cost data for all major titanium feedstock and pigment producers. Many and varied consulting assignments also enable TZMI to maintain an active dialogue with existing and potential participants in the industry and to keep fully aware of new developments.

TZMI's subsidiaries include TZ Pigments International (TZPI) and Allied Mineral Laboratories (AML). TZPI was established in 2006 to manage the growth of the company's technical consulting activities in the global titanium dioxide pigment industry. The company operates offices in China and South Africa. AML is a testing facility located in Western Australia that specialises in product assessment and flowsheet development for mineral sands, iron ore and other heavy mineral deposits. The company was established in June 2007.

TZMI's Publications and Data Services support its consulting activities, providing clients with a range of authoritative data and informed commentary on all aspects of the titanium minerals, zircon, titanium sponge and TiO₂ pigment industries.

From a free weekly news service to sector-specific periodicals and data matrices, multi-client studies and the flagship monthly industry-wide Mineral Sands Report TZMI offers a comprehensive suite of products and subscription options suitable for all industry participants.

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