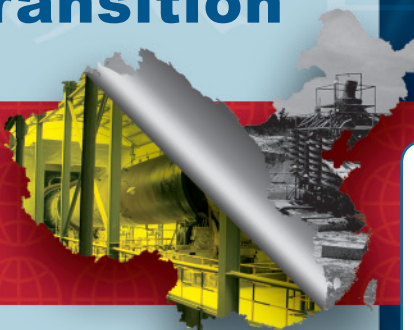


China TiO₂ – An industry in transition

OUT NOW



Will China's momentum continue in the TiO₂ industry?

Over the past two years a more complete picture of the growth momentum of the Chinese titanium dioxide industry has emerged. Former widespread perceptions of an industry dominated by small producers with sub-standard products are rapidly being replaced by the reality of an emerging industry dominated by larger sized companies with western-scale capacity, competitive products and improving quality.

These changes have created an unexpectedly dynamic trade balance characterised by higher consumption of domestic pigment and a decreasing reliance on imports to feed the growing consumer base. Increased competition in the Chinese market from domestic pigment will have an effect on regional producers that are facing growing competition from Chinese exports. The Chinese titanium dioxide industry is also becoming more aware of environmental issues and the necessity for investment into R&D fields. DuPont's interest in establishing a chloride route processing plant at the end of the decade adds a further dynamic to the equation.

TZ Minerals International's latest publication, *China TiO₂ – An industry in transition*, examines these crucial themes and more. Compiled over the past 12 months and incorporating extensive research and data gathered from a first hand knowledge of the Chinese TiO₂ industry, our information has been carefully selected, analysed and substantiated. This essential reference on the Chinese TiO₂ pigment industry 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 2010.
- ❑ Updates to the pricing, production and consumption information in our inaugural 2005 publication, *China TiO₂ – Scaling the Great Wall*.

China TiO₂ – An industry in transition will not only keep industry participants informed of the state-of-play in China, but will also provide valuable insights into those changes that will affect the industry as a whole.

To purchase your copy of *China TiO₂ – An industry in transition* simply complete the order form attached. For more information on *China TiO₂ – Scaling the Great Wall*, please review our industry reports at www.tzmi.com.

Table of contents

Executive Summary	
1.0	Introduction
1.1	Background
1.2	Structure of report
1.3	Data sources and accuracy
2.0	China: the country
2.1	11 th five-year plan 2006 – 2011
2.2	Key economic indicators
2.3	Conclusions
3.0	Chinese titanium feedstock sector
3.1	Introduction
3.2	Titanium feedstock production in China
3.3	Chinese sulfate ilmenite prices
3.4	Recent changes to the domestic & regional feedstock industry
4.0	The TiO ₂ pigment industry in China
4.1	Introduction
4.2	Review of current capacity, production and trade in 2005
4.3	Pigment pricing
4.4	Chinese TiO ₂ pigment production costs
5.0	The Chinese industry in technical perspective
5.1	Review of technology and operating issues
5.2	Pigment grades and quality issues
5.3	Chloride TiO ₂ technology
6.0	Chinese TiO ₂ and the environment
6.1	Introduction
6.2	Resource conservation (driving environmental considerations)
6.3	Regulation
6.4	Chinese TiO ₂ plants and the environment
6.5	Safety
6.6	Perspectives
7.0	Chinese end-use markets for TiO ₂ pigment
7.1	Market overview
7.2	Paint and coatings industry
7.3	Plastics
7.4	Paper & paper laminates
7.5	Inks
7.6	Other uses
8.0	Strategic outlook for the Chinese titanium industry to 2010
8.1	Introduction
8.2	China's position in the world
8.3	Titanium feedstocks
8.4	TiO ₂ pigment
8.5	End-use markets
8.6	Perspectives
Appendix 1 Chinese TiO ₂ pigment producer profiles	
Appendix 2 Major international TiO ₂ companies – Chinese contact details	



ORDER FORM			
Item:	Quantity	Price	Amount
<i>China TiO₂ – An industry in transition</i>		US\$4,950.00*	
<i>China TiO₂ – An industry in transition</i> PLUS <i>China TiO₂ – Scaling the Great Wall (2005)</i>		US\$9,500.00*	
Full RRP if purchased separately: US\$14,450*			
(* For Australian subscribers, the US\$ price will be converted to A\$ at the prevailing exchange rate on date of purchase plus 10% GST.)			TOTAL \$

PAYMENT DETAILS	
<p>Overseas Subscribers</p> <p>Please advise if invoice required - issued on confirmation of order.</p> <p><input type="checkbox"/> Telegraphic transfer to:</p> <p style="padding-left: 40px;">ANZ Bank International Services, Australia A/c Name: TZ Minerals International Pty Ltd A/c No. 2555-45838 ANZ Branch 016-498 Swift Code: ANZBAU3M</p> <p><input type="checkbox"/> Bank draft in US\$ drawn on US Bank by airmail:</p> <p style="padding-left: 40px;">TZ Minerals International Pty Ltd PO Box 48, West Perth, WA 6872, Australia</p>	<p>Australian Subscribers:</p> <p>Tax Invoice provided on confirmation of order.</p> <p><input type="checkbox"/> On-Line Banking to:</p> <p style="padding-left: 40px;">ANZ Bank West Perth, Western Australia A/c Name: TZ Minerals International Pty Ltd A/c No: 2555-45838 BSB: 016-498</p> <p><input type="checkbox"/> Cheque payable to:</p> <p style="padding-left: 40px;">TZ Minerals International Pty Ltd PO Box 48, West Perth WA 6872, Australia</p>

Credit Card:
 Visa
 Mastercard
 Amex
 Diners

Expiry Date: ____ / ____

Cardholder's Name: _____

Signature: _____

Payment of USD by Visa, M/Card or Diners may involve a small price variance due to the exchange conversion used by our Australian bank.

Name: _____

Position: _____

Company: _____

Postal Address: _____

Telephone: _____ Facsimile: _____

E-mail Address: _____ Website: _____



Please forward this form to TZMI by:

Fax: +61 8 9321 5919
E-mail: data@tzmi.com.au
Mail: PO Box 48, West Perth, WA 6872, Australia