

## Mining Chemicals – A Global Market Overview

*The report reviews, analyzes and projects the global market for Mining Chemicals for the period 2010-2020*

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### SUMMARY

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.

The backdrop against which current mining operations are undertaken is constantly changing, thereby rendering the concept of an all-purpose chemical solution redundant. This implies that chemical solutions specific for specific mines will be in demand over the coming years, with the requirement of unique chemicals for individual mining operations gaining in precedence. Different mines have different grades of ore deposits, which necessitates the use of varying treatment solutions. As a result, future growth in demand will be focused on customized mining chemical solutions with unique blends for individual mines.

Environmental concerns regarding mining operations in general and use of non-eco-friendly mining chemicals in particular are gaining momentum across the globe. This has prompted manufacturers to rethink their strategy and direct attention on developing safer and environmentally friendly chemicals. Mine operators, already under compulsion to reduce their carbon footprint, will benefit from the development of "green" chemicals, which will further propel growth in demand. The use of environmentally friendly mining chemicals will also enable mining companies in cutting down compliance costs related to environmental remediation. Low-carbon production of minerals is slated to maintain an upward trend over the coming years, leading to a greater research and development emphasis on eco-friendly chemicals.

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.

This 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.

The study 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 addresses, contact numbers and the website addresses of 60 companies.

Global Mining Chemicals Market Analysis (2010-2020)  
in USD Million



## SAMPLE COMPANY PROFILE

### AECI LIMITED

AECI Place, 24 The Woodlands,  
 Woodlands Drive, Woodmead, Sandton, SOUTH AFRICA  
 Tel: +27(0)11 806 8700, Fax: +27(0)11 806 8701  
 Website: www.aeci.co.za

#### Business Overview

Established in 1924, Sandton, South Africa-based AECI Limited is an explosives and specialty chemicals company engaged in offering products and services to the mining, production, and agricultural sectors. The Group has 16 businesses engaged in various business development operations, mainly focusing on the areas of mining solutions, water solutions, agrochemicals, food additives, and specialty chemicals.

#### Business Analysis

Business	Operation Particulars
Acacia Real Estate	Engaged in the development and maintenance of commercial real estate assets
AEL Mining Services	Engaged in developing, manufacturing and supplying commercial explosives, initiating systems, and blasting services for mining, quarrying and construction sectors
Akulu Marchon	Engaged in the supply of chemical raw materials and value-adding services to the cosmetics, toiletry and detergent industries
Chemfit	Engaged in offering specialized chemical products and services, including polymer additives, process additives, petrochemicals, technical products, soil fumigation, and animal health and nutrition
Chemical Initiatives	Engaged in the supply of specialty chemicals, raw materials and relative services for use in industrial applications in the manufacturing and mining areas
ChemSystems (Pty) Ltd	Engaged in offering a broad variety of products, services and chemical solutions for use in foundry, plastic, pulp, paper, tissue, leather, construction, polymer, marine, mining, and other industrial applications
Crest Chemicals	Engaged in the distribution of chemical raw materials to various industrial uses, including personal care and cosmetics
Expense	Engaged in the development of surface emulsifiers, underground emulsifiers, packaged emulsifiers, and specialized products
ImproChem	Engaged in offering advanced, high quality, safe, integrated water, energy, air and hygiene solutions to various industries encompassing upstream oil and gas extraction and production, crude oil refining, CTL and GTL plants, downstream petrochemicals, mining, metals, power generation, food and beverage, paper, sugar, textiles, and automobiles
Industrial Oleochemical Products	Engaged in the production of fatty acids and rosin, with the additional capacity to convert these into downstream products, such as resins, emulsifiers and other useful derivatives
Lake Foods	Engaged in the production and supply of specialty ingredients and commodities, offering products and services into the dairy, beverage, wine, meat, bakery, health and nutrition industries
Nulandis	Engaged in developing, manufacturing, formulating, and distributing specialized agricultural chemical products
Resinkem (Pty) Ltd	Engaged in the production and marketing of formaldehyde, urea formaldehyde resins and phenol formaldehyde resins
SANS Technical Fibers	Engaged in making a wide range of specialty nylon 6.6 light denier industrial and heavy denier air-jet textured yarns for high specification end use applications
Senmin	Engaged in the manufacture and supply of mining chemicals for use in the mineral processing of a broad variety of ores such as platinum, copper, zinc, and coal; and also polyacrylamides for use in tailings treatment
Specialty Minerals SA	SMSA is engaged in offering a range of products for use as value-added filler and coating materials by Mondi in the production of copy grade paper

AECI, through its businesses, mainly AEL Mining Services, and Senmin is engaged in manufacturing and supplying a range of specialty chemicals and solutions for use in the mining industry. The company has established R&D facilities in Modderfontein, and Sasolburg; and has regional and global businesses in Africa, South East Asia, and Australia.

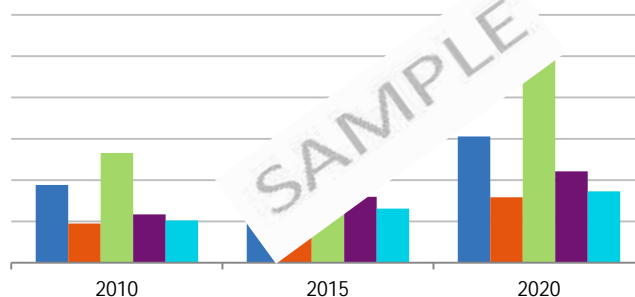
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## SAMPLE TABLE/CHART

Global Production of Barytes (2013) by Region – North America, Europe, Asia-Pacific, Latin America and Middle East & Africa in Metric Tons



Global Mining Chemicals Market (2010-2020) in Explosives & Drilling Applications by Geographic Region – North America, Europe, Asia-Pacific, Latin America and Middle East & Africa in USD Million



## KEY PLAYERS PROFILED

- 3M Company
- AECI Limited
- Akzonobel NV
- Arizona Chemical Company, LLC
- Ashland, Inc.
- BASF SE
- Beijing Hengju Chemical Group Corporation
- Celanese Corporation
- Chevron Phillips Chemical Company
- Clariant AG
- 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
- Nalco Holding Company
- Nasaco International LLC
- Orica Limited
- PQ Corporation
- Quaker Chemical Corporation
- Royal Dutch Shell Plc
- Sasol Limited
- SNF Floerger
- Tronox Limited
- Zinkan Enterprises Inc.

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