

Industrial minerals

by G.A. Brown*

A colloquium on industrial minerals entitled 'A Strategy for Growth in the Industrial Minerals Sector' was held at Mintek on 5th November, 1991, under the auspices of the Extractive Metallurgy Sub-Committee of the SAIMM. The SAIMM had not been previously active in the field of industrial minerals, and the programme was designed to appeal to the middle management of mining and manufacturing companies in the industrial-minerals field. A total of 86 registered for the Colloquium, a predominance of the delegates (65 per cent) being non-members of the SAIMM. Two overseas delegates were registered after announcements had been made in overseas publications. A total of 12 papers were read on a diverse range of minerals, including cement, kaolin, alumina ceramics and refractories, and activated clay in the processing of food and wine. Two papers were delivered on environmental aspects: one on the open-cast mining of silica, and the other on the regional development of resources and the effect on the environment.

MARKET DETERMINANTS

In a paper on the 'Market Determinants of Manufacturing Growth', Dr Edward Osborn, Nedbank's Chief Economist, pointed out South Africa's important position in the world with respect to industrial minerals, and indicated that, for 1990 in total, the domestic sales of industrial minerals amounted to as much as R822 million and the export sales to R374 million, giving an overall market in excess of R1 billion. In the export field, four minerals dominate: andalusite at sales of R56 million, asbestos at R172 million, fluorspar at R83 million, and vermiculite at R38 million. Domestically, there are also four that are dominant: andalusite at R34 million, silica at R66 million, salt at R76 million, and limestone and dolomite at R413 million, although there is a wide spread of other significant sales such as those for fluorspar, clay, gypsum, kaolin, etc.

The fact that the only exports of significance are

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andalusite, asbestos, fluorspar, and vermiculite is presumably a reflection of the generally wide distribution and availability of the respective industrial minerals throughout the world. It is only in these four minerals that there is a relative scarcity, with South Africa enjoying ranking of some significance. Other important exports are phosphate rock and mineral sands (rutile and zircon produced together with high-titania slag and pig iron); the mineral sands are produced from ilmenite by Richards Bay Minerals.

OUTLOOK FOR INDUSTRIAL MINERALS

A resumé of the total outlook for industrial minerals in South Africa was presented by Ms Alison Russell, deputy editor of *Industrial Minerals*, who provided a detailed review of the industrial-minerals sector. She indicated that industrial-minerals markets have not escaped unscathed from the current global recession, which has had an impact on markets both domestic and overseas. However, the longer-term prospects for minerals, particularly those which are internationally traded, are much brighter.

The lifting of sanctions has not yet had a major effect on the industrial-minerals industry in South Africa. Nevertheless, in the future the industry should benefit from the fact that joint ventures with foreign companies are becoming more feasible, from easier access to markets and from a climate that will facilitate South African companies overseas. Although sanctions were not applied directly to industrial minerals, they did make business more difficult. International trade in minerals of restricted availability and/or higher value, such as asbestos, andalusite, baddeleyite, chromite, diamonds, fluorspar, and mineral sands continued and, in some cases, thrived under the regime.

CLOSURE

A cocktail party sponsored by Afrox, Foskor, Genmin, and LTA Process Engineering completed a very successful meeting. It is hoped to repeat the exercise by organizing a similar event in the not-too-distant future in conjunction with societies in the industrial-minerals field.