

An overview of the world salt industry

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The presentation will give a comprehensive global overview of the salt market. Much of the information will be sourced from the new edition of the Roskill publication 'The Economics of Salt'. The company has been publishing this study since 1971, and last produced the report in 1997. This year will see the launch of the 10th edition.

Over the years, this publication has become one of the most highly respected sources of information on the global salt industry. The length of time over which the report has been published allows Roskill to present comprehensive historical data for all aspects of the salt industry. Roskill analysts are backed by one of the most comprehensive in-house information databases in the metals and minerals field. The report is additionally based upon discussions with key companies in the industry, on-line databases, the trade press in many countries, and data held in specialist libraries and government departments.

The paper will present Roskill's outlook for the salt industry, including projections for the supply/demand balance. The important factors facing the industry will be identified, as will their probable effect on the future of the salt sector.

An analysis of salt supply will be presented. The previous edition of 'The Economics of Salt' had entries covering supply in 124 countries and the new edition is even more comprehensive. The latest Roskill estimates of production will be presented from national, regional, and global points of view.

Major salt producing countries such as the USA, China, Canada, Germany, India, Mexico, the Ukraine, Australia, France, and the UK will be covered in detail, including historical production data, new salt operations, and a review of likely new developments. China receives particularly extensive coverage in the new report.

Information will also be presented on the major companies producing salt, including Morton Salt, Akzo Nobel, IMC Global, and Solvay. The paper will cover the latest corporate developments, such as the sale of Morton Salt, the proposed sale of British Salt in the UK, and possible ownership changes of IMC Salt. Past and present control of capacity by companies on a global basis will be included. The

expansions, and the closures of plants. This will include information on projects in Australia, the Middle East, North America and the USA, and Europe.

Salt is a bulky commodity which is produced in many countries around the world. For this reason, the international trade in salt is relatively unimportant in comparison with many other commodities. The paper will, however, review significant trade movements. Roskill has access to considerable quantities of trade data, and the paper will illustrate the main movements of salt around the world. There are two main types of trade in the salt market. Sometimes, salt is imported into localised areas of high consumption, for example Japan. In the mid-1990s, over 95% of Japanese salt imports were sourced from Mexico and Australia. To ensure supply, Japanese companies have an ownership stake in some producers in these countries. Secondly, there is a trade in salt across shared borders. This principally applies to the USA and Canada, and countries in Europe. There is also a considerable trade in salt imported into Scandinavia.

Figures will be given for demand by end use. Again, this will be on a national, regional, and global basis. The major end uses for salt will be profiled in detail, including chlor-alkali and soda ash production, de-icing, and human consumption.

Although data for salt consumption on a global basis is important, it masks the pattern of national and regional consumption. In some countries, the chemical industry is by far the largest consumer, but in others salt for use by the food and agricultural industries is more significant. In the northern hemisphere, some countries have a large requirement for salt for deicing purposes. For this reason, the paper will include both a global breakdown of the salt industry and a discussion of consumption on a national and regional basis.

The different end uses will be analysed to predict future demand for salt. The future of the chlor-alkali industry will be covered with a view to future salt consumption. The changing balance of chlor-alkali production in Asia will be profiled, including the shift away from Japan towards production in countries such as Malaysia and Indonesia.