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TiO₂: Does 2Q20 Present Reasons for Optimism?

The August issue of *Ti Observer Insights* – now available – reviews the results of 2Q20 and an outlook for 3Q20, presenting TiPMC’s view of the value chain post-pandemic and how the industry will manage the market through the end of the pandemic. The future is bright, but strong management through the current situation is critical. TiPMC takes a deep look at every producer, the data behind their optimism, and analyzes who will thrive and demand returns.

TiPMC also looks at Lomon Billions. How have they managed their business during the pandemic? What do their results and behavior suggest about their influence on the entire industry?

As always, the data tells the story, and TiPMC sees some hidden factors that are not apparent at first glance:

- Who outperformed expectations in 2Q20?
- TiPMC provides a new relationship between Capacity Utilization and Pricing, and what are the forward-looking signs TiPMC sees that have never before been discussed?
- What is the demand signal outside of China telling investors and industry participants?
- Why is the Lomon Billions China strategy so critical? How much value can they provide or take, and what is the impact on the market capitalization of the entire industry?

This issue is the perfect complement to our just-released *Mineral Sands Forecast*. We translate the feedstock world into our outlook for the industry in for the first half of the new decade.

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I welcome your calls, questions and requests,



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