

NOW AVAILABLE!

The TiO₂ Value Chain HeatMap

TiO₂: China Continues to Remove Profitability from Value Chain Europe Remains Sluggish

Large Producers of TiO₂ and Mineral Sands continue to release their earnings for 2024. Although it may not be explicitly stated, the Chinese industry continues to remove profitability from the entire Value Chain. Also, everyone is hoping for European economies to improve and use more TiO₂ containing products.

The Mid-Winter issue of the *Ti Observer™ Insights* – now available – provides our members and subscribers with our current Value Chain HeatMap. Our in-depth analysis will explain, dispute, and provide an independent look at the claims from industry participants and analysts. Our analysis is based on the latest data, utilizing our Tableau® for TiO₂ tools. This timely edition displays over 90 industry metrics, with a complete explanation of their current impact and the consequences for the foreseeable future. The in depth review of the entire value chain uncovers secrets that you will not find anywhere beyond TiPMC. The *Mid-Winter HeatMap* is a must read for all industry participants, suppliers, buyers, and investment professionals. TiPMC provides a unique analysis, tailored for readers looking to gain insight 2024 results and the outlook for the rest 2025.

Highlights in this issue include:

- How could 2024 have seen so much improvement in global demand, but global TiO₂ and feedstock producers are not feeling it? What is the true meaning and data behind the “differentiation” among TiO₂ producers, and how are world economic and political developments influencing all segments so strongly?
- What did we see in 2024 as a result of new anti-dumping tariffs? What are we likely to see in 2025? What are the influences that determine the degree of benefit and harm industry participants may experience? Who are the big winners to date?
- How much profitability has China removed from the value chain? Who is feeling it the most?
- Are we at the point where Multi-National Producers (MNP) are only competing for business among themselves? Is China and its customer base and completely different market segment?

Continued

- How is China influencing feedstock prices worldwide? What products are being impacted the most? Is China utilizing the same Relative Economic Value and Value-in-Use concepts utilized by the rest of the world?
- What is the impact of the recently proposed tariffs for India? How will it impact each MNP, and what happens to the Chinese tonnes that are being transitioned from in tariffed countries?
- What conditions can change the MNP who is in the most favorable position? How does it impact feedstock suppliers?

Interested in learning more about our Subscription and VIP Membership? Visit our website or contact us directly. We can prepare the perfect package to meet your needs. Inquire about our **Tableau® for TiO₂**, the tool which empowers decision makers to see latest developments relative to trends in import statistics for TiO₂.

Interested in learning more about TiPMC Consulting, Robert Fry Economics LLC, or our other collaboration partners? Visit either website or contact us directly. We collaborate on Webinar and Seminar services to provide you and your clients the most unique and most trusted views on the TiO₂, Mineral Sands, and Chemical Industry moving forward.

Current Subscribers Log-in, [click here.](#)

To become a Subscriber or for more information, [click here.](#)

To visit Robert Fry Economics LLC website, [click here.](#)

I welcome your calls, questions and requests,



Gerry Colamarino
Managing Director, TiPMC Consulting
+1.408.368.7759
gcolamarino@tipmconsulting.com
www.tipmconsulting.com