



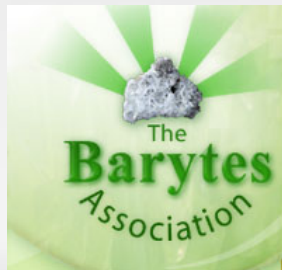
ZIRCON INDUSTRY ASSOCIATION

Why join the Zircon Industry Association?

www.zircon-association.org



Most commodities have industry associations



What do industry associations do?

- ❖ Represent the collective interests of their members
- ❖ Further the interests of their industries
- ❖ Identify and address threats and opportunities
- ❖ Promote their commodities and support market development
- ❖ Communicate with stakeholders at industry level
- ❖ Provide regulatory support
- ❖ Provide a form for exchange of ideas at the scientific and technical levels

Genesis of Zircon Industry Association

- ❖ The industry seeks to develop new markets and applications for zircon and its derivatives.
- ❖ At the same time, zircon and its derivatives face a number of threats from which defence at industry level is needed:
 - thrifting and competition from substitute materials;
 - ever increasing regulation.
- ❖ Market support and development is essential to sustainable growth of the industry.
- ❖ The zirconium value chain had no industry body to represent and defend its interests.
- ❖ The Zircon Industry Association was conceived in 2012 and became a reality on January 1st 2013.



Purposes of Zircon Industry Association

- ❖ **Promote the use of zircon and zircon-based materials in a wide range of applications**
- ❖ **Represent the collective interests of Members in international industry, trade, and other forums**
- ❖ **To consult, for purposes of its research or investigations, with governments and agencies and with other organisations/entities**
- ❖ **Collect and provide technical and other industry information, commercially sensitive or proprietary information always excluded**
- ❖ **Provide a forum for co-operation and exchange of ideas and information on scientific and technical matters related to the zircon industry**

Code of conduct

- ❖ **Industry associations are on the radar of competition law regulators**
- ❖ **The Zircon Industry Association therefore has a strict Code of Conduct for compliance with competition and anti-trust regulations - this forms part of our Articles of Association and can be found on our website**
- ❖ **K&L Gates LLP (which has a strong competition law practice with industry association experience) is our legal counsel and provides compliance support**

Current members



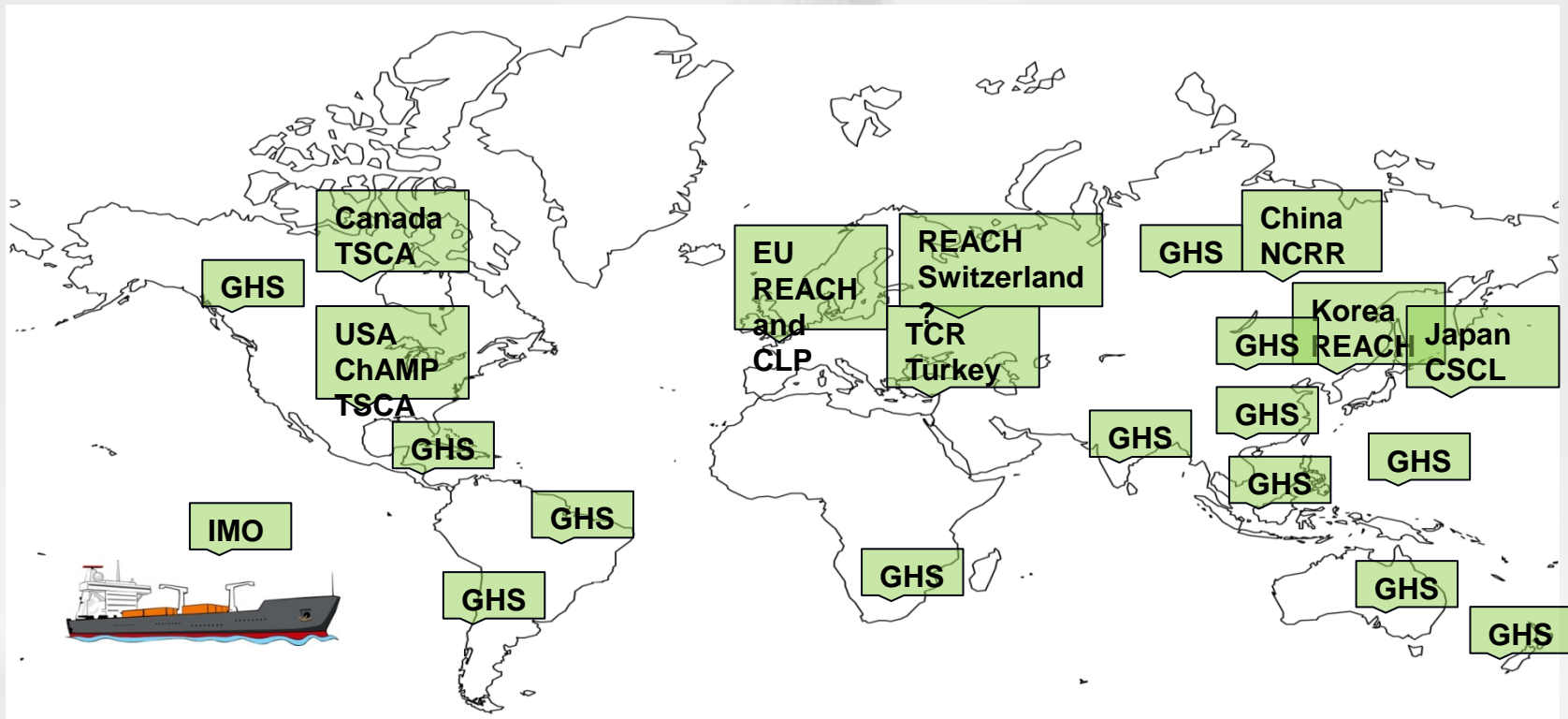
Key areas of focus - at a global level - 1

- ❖ **Support for development of new applications and markets across the value chain**
 - **R&D at academic and industry level**
- ❖ **Support for existing markets:**
 - **ceramics, refractories, foundries & investment casters, chemicals**
- ❖ **Communications with industry stakeholders:**
 - **customer industries, academia, regulators, investment and financial community, media, etc.**
 - **website, conferences, trade and industry media, social media, publications, etc.**

Key areas of focus - at a global level - 2

❖ Regulatory support:

- radioactivity issues
- chemical industry regulation, etc.
- lobbying for sensible and practicable regulations

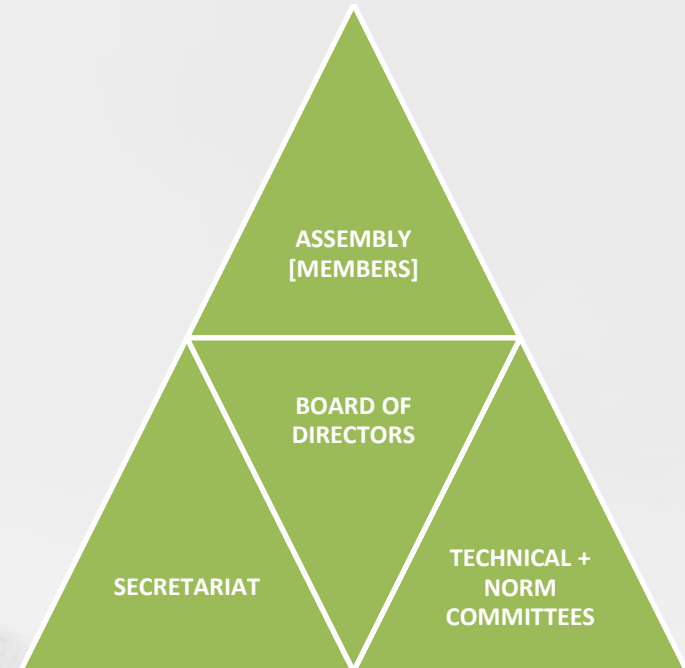


Structure and membership

- ❖ Incorporated in UK as an independent, not-for-profit company, limited by guarantee.
- ❖ Represents all elements of the value chain, from zircon to zirconia to chemicals
- ❖ Full membership:
 - Producers and Consumers of zircon sand
- ❖ Associate membership:
 - Other organisations involved with the industry, but not as producers or consumers
 - Smaller produces and consumers

Organisation

- ❖ High level decisions taken by members in the **Assembly**, e.g. changes to Articles of Association
- ❖ **Board** is responsible for overall achievement of purposes, strategy, financial matters, audit and governance. Board is elected by the membership
- ❖ **Secretariat** is responsible to the Board for implementation of its strategy and day-to-day management, member relations, external relations, etc.
- ❖ **Technical Committee** identifies and oversees technical projects and certain regulatory affairs
- ❖ **NORM Committee** deals with regulatory support in the area of radioactivity



Benefits of membership - intangible

- ❖ Higher profile for zircon and derivatives due to targeted marketing and product support programmes
- ❖ “Demand pull” created from branding and product awareness programmes
- ❖ Greater impact of industry-wide approach to regulatory issues
- ❖ Enhancement of corporate image through buy-in to ZIA standards, e.g. safety, health and environment, sustainable development, etc.
- ❖ Being part of the ZIA “community,” e.g. best practice
- ❖ The concept of a one-stop shop for the zircon industry

THE WHOLE IS GREATER THAN THE SUM OF THE PARTS!

Benefits of membership - tangible

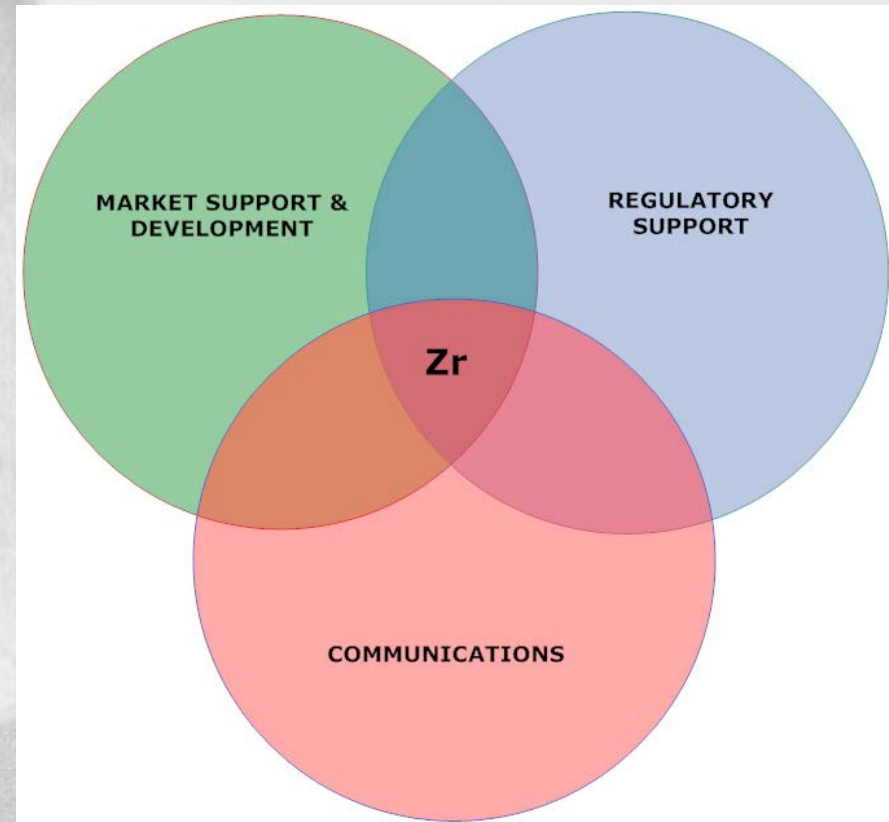
- ❖ Participation in market development, technical and research & development programmes
- ❖ Access to the members only knowledge base
- ❖ Members meetings:
 - networking opportunities
 - technical programme content
- ❖ Participation in Technical and NORM committees
- ❖ Regulatory information and support

Highlights from 2015

- ❖ Publication of the second edition of our Technical Handbook on Zirconium and Zirconium Compounds [available by request through the [website contact form](#)].
- ❖ Publication of technical article in Ceramic Forum International based on our work on the substitution of zircon in ceramic industry applications [frits, glazes, engobes, ceramic bodies].
- ❖ Agreement on “crowd funding” approach for financing of technical projects
- ❖ Ongoing regulatory support programme covering NORM/radioactivity, chemical industry regulation [REACH, CLP, etc.] and International Maritime Organisation regulations.
- ❖ Formulation of communications strategy and the start of its implementation.
- ❖ First ZIA conference, Florence Italy October 4th-5th

Activities and plans for 2016

- ❖ Life cycle assessment project
- ❖ Conferences and presentations:
 - 14th World Conference on Investment Casting , Paris, April 2016
 - Heavy Minerals Conference , South Africa, August 2016
 - EAN NORM Workshop, Stockholm, December 2016
- ❖ ZIA/TZMI joint zircon session, Hong Kong, November 2016
- ❖ Establishment of “informed value chains” with customer industries
- ❖ Establishment of ZIA values and accreditation thereto



Membership fees 2016

❖ Full Members

- Zircon sand producers: \$0.105 per tonne of zircon sand produced [reference year 2013] - subject to minimum \$7,500
- Zircon sand consumers: \$6,325

❖ Associate Members: \$5,000

- companies or organisations involved in the industry other than as producers or consumers of zircon sand [traders/distributors, logistics providers, developers, consultants, etc.]
- a producer or consumer of zircon sand with an annual production or consumption volume of less than 10,000 tonnes zircon sand [such producers or consumers are of course welcome to take out full membership]



Join our members and support your industry!

- ❖ The more members we have:
 - the stronger our voice in representing the industry
 - the more we can do for the industry
 - the wider we can spread the costs
- ❖ Please feel free to ask for further information about our plans/activities and membership details

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