

9th Edition

THE GLOBAL ZIRCON INDUSTRY

"Challenging new dynamics"

TZMI

THE GLOBAL ZIRCON INDUSTRY

Challenging new dynamics

WHAT DO YOU RECEIVE?

The Global Zircon Industry – Challenging new dynamics is an essential and comprehensive publication covering one of the most buoyant sectors of the mineral sands industry. It provides up-to-date commentary and independent analysis of the zircon sector including producers, end-consumers, supply and demand scenarios, potential new sources of supply, as well as an outlook for coming years. The information contained in *The Global Zircon Industry* is carefully researched drawing on TZMI's extensive database. It is also an essential reference for the industry while identifying key trends and developments within the sector and the broader impact on a global scale.

WHO SHOULD BUY THIS REPORT?

This publication is a significant resource for participants in the zircon sector and extends to those in the mineral sands industry in general. It is suitable for those wanting to maintain an in depth understanding of the sector, including:

- · Zircon producers
- · Zircon end-users including those in:
 - o Ceramics
 - o Refractories
 - o Foundries
 - o Specialty chemicals and materials
- New producers
- · Mineral sands industry participants
- Financial industry (fund managers, hedge funds, investors and potential investors)

The Global Zircon Industry A\$7,500 excluding GST. For Australian subscribers, 10% GST will be added to the listed price.

WHAT INFORMATION IS INCLUDED?

The Global Zircon Industry – *Challenging new dynamics* will provide comprehensive analysis and commentary on the following areas of the sector:

- An introduction to the sector
- · Ceramics segment
- Specialty chemicals and materials
- Refractories and foundries
- Demand
- Supply
- New projects
- Strategic issues
- · Profiles on all sector participants



TABLE OF CONTENTS

EXECUTIVE SUMMARY

1.0 INTRODUCTION

- 1.1 The zircon value chain
- 1.2 Uses of zircon
- 1.3 The zircon market
- 1.4 Sources of zircon
- 1.5 Structure of this publication

2.0 DEMAND FOR ZIRCON IN CERAMICS

- 2.1 Introduction
- 2.2 The use of zircon in ceramics
- 2.3 The global tile industry
- 2.4 Review of major tile producing countries
- 2.5 Other important producing countries
- 2.6 The outlook for zircon consumption in ceramics

3.0 DEMAND FOR ZIRCON IN SPECIALTY CHEMICALS AND MATERIALS

- 3.1 General features
- 3.2 Overall structure of the sector
- 3.3 Fused zirconia
- 3.4 Zirconium chemicals
- 3.5 Chemical zirconia
- 3.7 The outlook for zircon use in specialty chemicals and materials

4.0 DEMAND IN REFRACTORIES AND FOUNDRIES

- 4.1 Zircon in the refractory industry
- 4.2 Demand for zircon in the refractory industry
- 4.3 Refractory sector distribution
- 4.4 Refractory supply
- 4.5 Zircon in the foundry industry

5.0 DEMAND

- 5.1 Ceramics
- 5.2 Specialty chemicals and materials
- 5.3 Refractories and foundries
- 5.4 Foundry

6.0 POTENTIAL SUPPLY FROM NEW PROJECTS

- 6.1 Approved projects not yet commissioned
- 6.2 Projects with completed technical feasibility studies
- 6.3 Projects under active investigation with production schedules
- 6.4 Projects under active investigation without production schedules

7.0 SUPPLY

- 7.1 Introduction
- 7.2 Supply by region
- 7.3 Supply by producer
- 7.4 Overview of key existing producers
- 7.5 Zircon concentrate
- 7.6 Zircon supply and indicative outlook to 2015

8.0 SUPPLY/DEMAND BALANCES AND PRICING

9.0 ZIRCON PRICING

- 9.1 Price forecasting methodology
- 9.2 Zircon price history
- 9.3 Recent price developments and price forecasts
- 9.4 Zircon concentrate pricing
- 10.0 STRATEGIC ISSUES
- APPENDIX 1 KEY FEATURES OF ZIRCON
- APPENDIX 2 ZIRCON PRODUCER PROFILES

APPENDIX 3 - ZIRCON CONSUMER PROFILES

APPENDIX 4 - NEW PROJECTS PROFILES

TABLES

- Table 2.1: Tile manufacture by category
- Table 2.2: Typical compositions of porcellanato and ceramic tiles
- Table 2.3: Several different porcellanato compositions
- Table 2.4: Weight of zircon in a square metre of selected tile types
- Table 2.5: Contribution to raw material cost in white porcellanato tiles: 2008 prevailing prices
- Table 2.6: Contribution to raw material cost in white porcellanato tiles: 2011 real zircon sand prices
- Table 2.7: Contribution to raw material cost in white porcellanato tiles: Q4 2011 zircon sand prices
- Table 2.8: Contribution to raw material cost in white porcellanato tiles
- Table 2.9: Refractive index of opacifiers
- Table 2.10: Regional tile production: 2006-2010
- Table 2.11: Regional tile consumption: 2006-2010
- Table 2.12: Regional production and consumption in 2010
- Table 2.13: Top 10 tile producing companies in 2010
- Table 2.14: Underlying zircon demand in ceramics
- Table 3.1: Zircon sand required for specialty chemical & material products
- Table 3.2: Producers of fused zirconia in 2010
- Table 3.3: End-uses for fused zirconia and baddeleyite in 2010
- Table 3.4: Main zirconium chemicals and their uses
- Table 3.5: End-uses for ZOC in 2010
- Table 3.6: Producers of ZOC and ZBS in 2010
- Table 3.7: Typical XRF assays for fused and chemical zirconia
- Table 3.8: Producers of chemical zirconia in 2010
- Table 3.9: End-uses for chemical zirconia in 2010
- Table 3.10: Producers of zirconium sponge in 2010
- Table 3.11: Demand for zircon sand in specialty chemicals and materials: 2008-2015^r
- Table 4.1: Key drivers impacting zircon consumption in the steel industry
- Table 4.2: Key drivers impacting zircon consumption in the glass industry
- Table 4.3: Prices of refractory grade minerals
- Table 4.4: Demand forecast for zircon for use in refractories to 2015
- Table 4.5: Summary of demand for zircon for use in foundry sand
- Table 5.1: Regional tile production: 2006-2010
- Table 6.1: Salient features of approved and potential projects
- Table 8.1: Zircon supply/demand balances: 2010-2015



FIGURES

Figure 1.1: Schematic structure of the zircon industry Figure 1.2: Zircon consumption by end-use market in 2010 Figure 2.1: Consumption of zircon in ceramics: 1981-2011 Figure 2.2: Schematic tile production process Figure 2.3: Global tile production: 1980-2010 Figure 2.4: Cumulative contribution to global production top 10 producing countries in 2010 Figure 2.5: Cumulative contribution to global demand from top 10 consuming countries in 2010 Figure 2.6: Floorspace completed each year in China: 1990-2010 Figure 2.7: Zircon consumed by tile type in China in 2010 Figure 2.8: Major tile production centres Figure 2.9: Exports and domestic consumption of Italian tiles: 2003-2010 Figure 2.10: Italy's tile production region Figure 2.11: Trade and consumption of Spanish tiles: 2002-2010 Figure 2.12: Castellon - Spain's ceramic producing region Figure 2.13: Spanish tile export sales by destination: 2006 & 2010 Figure 2.14: Spanish housing completions: 1991-2011 Figure 2.15: Brazilian domestic and export sales: 2000-2010 Figure 2.16: Global zircon use by product type in 2010 Figure 2.17: Consumption of zircon in ceramics in 2010 Figure 2.18: Zircon intensity of use in global ceramics: 1993-2015 Figure 3.1: Structure of the zirconia, zirconium chemicals and metals industries Figure 3.2: End-use consumption of ZrO₂ units in 2010 Figure 3.3: Zirconia casting nozzles Figure 3.4: Praseodymium yellow, a zirconia-based ceramic pigment Figure 3.5: Zirconia grinding media Figure 3.6: Price, cost and margin for ZOC in China: 1998-2011e Figure 3.7: A catalytic converter installed on an SUV Figure 3.8: Zirconia ferrules Zircon sand distribution among specific end-uses in Figure 3.9: 2010 Figure 4.1: Temperature regimes for industrial applications of refractories Figure 4.2: Crude steel production by region: 2000-2010 Figure 4.3: Zircon consumption in steel refractories and global steel output comparison: 2000-2010 Figure 4.4: Global flat glass production and GDP: 1991-2009 Figure 4.5: Leading world refractory producers Figure 4.6: Global steel output and zircon demand in steel refractories Zircon demand for use in refractories by region in 2010 Figure 4.7: and 2015

 Figure 4.8: Consumption of zircon sand in foundry casting: 1990-2010 Figure 4.9: Cast metal tonnage by country: 2005-2009 Figure 4.10: Cast tonnages by metal type in 2009 Figure 4.11: Thermal expansion profiles of the major foundry sands Figure 4.12: Chart of chromite versus zircon prices Figure 5.1: Global zircon use by product type in 2010 Figure 5.2: Zircon sand distribution among specific end-uses in 2010 Figure 7.1: Zircon to TiO₂ production ratio: 1991-2010 Figure 7.2: Distribution of global zircon production by country in 2010 Figure 7.3: Annual zircon production by country: 2001-2011 Figure 7.4: Annual zircon production by country: 2001-2011 Figure 7.5: Origin of identified zircon concentrate shipments Figure 7.6: Identified global zircon supply/demand: 2004-2010 Figure 8.1: Changes in zircon demand: 2008-2011 Figure 9.2: Identified zircon import prices for China and Europe: Jul 2009-Sep 2011 Figure 9.3: Domestic spot prices in China: Jan 2011 - Sep 2011 Figure 9.4: Bulk premium zircon price forecasts to 2015 (real terms) Figure 9.5: Global zircon concentrate imports pricing: Aug 2009-Aug 2011 		
 Figure 4.10: Cast tonnages by metal type in 2009 Figure 4.11: Thermal expansion profiles of the major foundry sands Figure 4.12: Chart of chromite versus zircon prices Figure 5.1: Global zircon use by product type in 2010 Figure 5.2: Zircon sand distribution among specific end-uses in 2010 Figure 7.1: Zircon to TiO₂ production ratio: 1991-2010 Figure 7.2: Distribution of global zircon production by country in 2010 Figure 7.3: Annual zircon production by country: 2001-2011 Figure 7.4: Annual zircon production share by company: 2001-2011 Figure 7.5: Origin of identified zircon concentrate shipments Figure 7.6: Identified global zircon supply/demand: 2004-2010 Figure 8.1: Changes in zircon demand: 2008-2011 Figure 8.2: Base case global zircon prices US\$: 1970-2010 Figure 9.1: Australian FOB bulk zircon prices US\$: 1970-2010 Figure 9.3: Domestic spot prices in China: Jan 2011 - Sep 2011 Figure 9.4: Bulk premium zircon price forecasts to 2015 (real terms) Figure 9.5: Global zircon concentrate imports pricing: Aug 2009- 	Figure 4.8:	
 Figure 4.11: Thermal expansion profiles of the major foundry sands Figure 4.12: Chart of chromite versus zircon prices Figure 5.1: Global zircon use by product type in 2010 Figure 5.2: Zircon sand distribution among specific end-uses in 2010 Figure 7.1: Zircon to TiO₂ production ratio: 1991-2010 Figure 7.2: Distribution of global zircon production by country in 2010 Figure 7.3: Annual zircon production by country: 2001-2011 Figure 7.4: Annual zircon production share by company: 2001-2011 Figure 7.5: Origin of identified zircon concentrate shipments Figure 7.6: Identified global zircon supply/demand: 2000-2015 Figure 8.1: Changes in zircon demand: 2008-2011 Figure 9.1: Australian FOB bulk zircon prices US\$: 1970-2010 Figure 9.2: Identified zircon import prices for China and Europe: Jul 2009-Sep 2011 Figure 9.4: Bulk premium zircon price forecasts to 2015 (real terms) Figure 9.5: Global zircon concentrate imports pricing: Aug 2009- 	Figure 4.9:	Cast metal tonnage by country: 2005-2009
 Figure 4.12: Chart of chromite versus zircon prices Figure 5.1: Global zircon use by product type in 2010 Figure 5.2: Zircon sand distribution among specific end-uses in 2010 Figure 7.1: Zircon to TiO₂ production ratio: 1991-2010 Figure 7.2: Distribution of global zircon production by country in 2010 Figure 7.3: Annual zircon production by country: 2001-2011 Figure 7.4: Annual zircon production share by company: 2001-2011 Figure 7.5: Origin of identified zircon concentrate shipments Figure 7.6: Identified global zircon concentrate shipments: 2004-2010 Figure 8.1: Changes in zircon demand: 2008-2011 Figure 8.2: Base case global zircon supply/demand: 2000-2015 Figure 9.1: Australian FOB bulk zircon prices US\$: 1970-2010 Figure 9.2: Identified zircon import prices for China and Europe: Jul 2009-Sep 2011 Figure 9.4: Bulk premium zircon price forecasts to 2015 (real terms) Figure 9.5: Global zircon concentrate imports pricing: Aug 2009- 	Figure 4.10:	Cast tonnages by metal type in 2009
Figure 5.1:Global zircon use by product type in 2010Figure 5.2:Zircon sand distribution among specific end-uses in 2010Figure 7.1:Zircon to TiO2 production ratio: 1991-2010Figure 7.2:Distribution of global zircon production by country in 2010Figure 7.3:Annual zircon production by country: 2001-2011Figure 7.4:Annual zircon production share by company: 2001- 2011Figure 7.5:Origin of identified zircon concentrate shipmentsFigure 7.6:Identified global zircon concentrate shipments: 2004- 2010Figure 8.1:Changes in zircon demand: 2008-2011Figure 8.2:Base case global zircon supply/demand: 2000-2015Figure 9.1:Australian FOB bulk zircon prices US\$: 1970-2010Figure 9.2:Identified zircon import prices for China and Europe: Jul 2009-Sep 2011Figure 9.3:Domestic spot prices in China: Jan 2011 - Sep 2011Figure 9.4:Bulk premium zircon price forecasts to 2015 (real terms)Figure 9.5:Global zircon concentrate imports pricing: Aug 2009-	Figure 4.11:	Thermal expansion profiles of the major foundry sands
Figure 5.2:Zircon sand distribution among specific end-uses in 2010Figure 7.1:Zircon to TiO2 production ratio: 1991-2010Figure 7.2:Distribution of global zircon production by country in 2010Figure 7.3:Annual zircon production by country: 2001-2011Figure 7.4:Annual zircon production share by company: 2001- 2011Figure 7.5:Origin of identified zircon concentrate shipmentsFigure 7.6:Identified global zircon concentrate shipments: 2004- 2010Figure 7.7:Zircon supply outlook to 2015Figure 8.1:Changes in zircon demand: 2008-2011Figure 9.1:Australian FOB bulk zircon prices US\$: 1970-2010Figure 9.2:Identified zircon import prices for China and Europe: Jul 2009-Sep 2011Figure 9.3:Domestic spot prices in China: Jan 2011 - Sep 2011Figure 9.4:Bulk premium zircon price forecasts to 2015 (real terms)Figure 9.5:Global zircon concentrate imports pricing: Aug 2009-	Figure 4.12:	Chart of chromite versus zircon prices
2010Figure 7.1:Zircon to TiO2 production ratio: 1991-2010Figure 7.2:Distribution of global zircon production by country in 2010Figure 7.3:Annual zircon production by country: 2001-2011Figure 7.4:Annual zircon production share by company: 2001- 2011Figure 7.5:Origin of identified zircon concentrate shipmentsFigure 7.6:Identified global zircon concentrate shipments: 2004- 2010Figure 8.7:Zircon supply outlook to 2015Figure 8.1:Changes in zircon demand: 2008-2011Figure 9.1:Australian FOB bulk zircon prices US\$: 1970-2010Figure 9.2:Identified zircon import prices for China and Europe: Jul 2009-Sep 2011Figure 9.3:Domestic spot prices in China: Jan 2011 - Sep 2011Figure 9.4:Bulk premium zircon price forecasts to 2015 (real terms)Figure 9.5:Global zircon concentrate imports pricing: Aug 2009-	Figure 5.1:	Global zircon use by product type in 2010
Figure 7.2:Distribution of global zircon production by country in 2010Figure 7.3:Annual zircon production by country: 2001-2011Figure 7.4:Annual zircon production share by company: 2001- 2011Figure 7.5:Origin of identified zircon concentrate shipmentsFigure 7.6:Identified global zircon concentrate shipments: 2004- 2010Figure 7.7:Zircon supply outlook to 2015Figure 8.1:Changes in zircon demand: 2008-2011Figure 9.2:Base case global zircon supply/demand: 2000-2015Figure 9.1:Australian FOB bulk zircon prices US\$: 1970-2010Figure 9.2:Identified zircon import prices for China and Europe: Jul 2009-Sep 2011Figure 9.3:Domestic spot prices in China: Jan 2011 - Sep 2011Figure 9.4:Bulk premium zircon price forecasts to 2015 (real terms)Figure 9.5:Global zircon concentrate imports pricing: Aug 2009-	Figure 5.2:	
2010Figure 7.3:Annual zircon production by country: 2001-2011Figure 7.4:Annual zircon production share by company: 2001- 2011Figure 7.5:Origin of identified zircon concentrate shipmentsFigure 7.6:Identified global zircon concentrate shipments: 2004- 2010Figure 7.7:Zircon supply outlook to 2015Figure 8.1:Changes in zircon demand: 2008-2011Figure 9.2:Base case global zircon supply/demand: 2000-2015Figure 9.1:Australian FOB bulk zircon prices US\$: 1970-2010Figure 9.2:Identified zircon import prices for China and Europe: Jul 2009-Sep 2011Figure 9.3:Domestic spot prices in China: Jan 2011 - Sep 2011Figure 9.4:Bulk premium zircon price forecasts to 2015 (real terms)Figure 9.5:Global zircon concentrate imports pricing: Aug 2009-	Figure 7.1:	Zircon to TiO ₂ production ratio: 1991-2010
Figure 7.4:Annual zircon production share by company: 2001- 2011Figure 7.5:Origin of identified zircon concentrate shipmentsFigure 7.6:Identified global zircon concentrate shipments: 2004- 2010Figure 7.7:Zircon supply outlook to 2015Figure 8.1:Changes in zircon demand: 2008-2011Figure 8.2:Base case global zircon supply/demand: 2000-2015Figure 9.1:Australian FOB bulk zircon prices US\$: 1970-2010Figure 9.2:Identified zircon import prices for China and Europe: Jul 2009-Sep 2011Figure 9.3:Domestic spot prices in China: Jan 2011 - Sep 2011Figure 9.4:Bulk premium zircon price forecasts to 2015 (real terms)Figure 9.5:Global zircon concentrate imports pricing: Aug 2009-	Figure 7.2:	0 1 , ,
2011Figure 7.5:Origin of identified zircon concentrate shipmentsFigure 7.6:Identified global zircon concentrate shipments: 2004- 2010Figure 7.7:Zircon supply outlook to 2015Figure 8.1:Changes in zircon demand: 2008-2011Figure 8.2:Base case global zircon supply/demand: 2000-2015Figure 9.1:Australian FOB bulk zircon prices US\$: 1970-2010Figure 9.2:Identified zircon import prices for China and Europe: Jul 2009-Sep 2011Figure 9.3:Domestic spot prices in China: Jan 2011 - Sep 2011Figure 9.4:Bulk premium zircon price forecasts to 2015 (real terms)Figure 9.5:Global zircon concentrate imports pricing: Aug 2009-	Figure 7.3:	Annual zircon production by country: 2001-2011
Figure 7.6:Identified global zircon concentrate shipments: 2004-2010Figure 7.7:Zircon supply outlook to 2015Figure 8.1:Changes in zircon demand: 2008-2011Figure 8.2:Base case global zircon supply/demand: 2000-2015Figure 9.1:Australian FOB bulk zircon prices US\$: 1970-2010Figure 9.2:Identified zircon import prices for China and Europe: Jul 2009-Sep 2011Figure 9.3:Domestic spot prices in China: Jan 2011 - Sep 2011Figure 9.4:Bulk premium zircon price forecasts to 2015 (real terms)Figure 9.5:Global zircon concentrate imports pricing: Aug 2009-	Figure 7.4:	
2010Figure 7.7:Zircon supply outlook to 2015Figure 8.1:Changes in zircon demand: 2008-2011Figure 8.2:Base case global zircon supply/demand: 2000-2015Figure 9.1:Australian FOB bulk zircon prices US\$: 1970-2010Figure 9.2:Identified zircon import prices for China and Europe: Jul 2009-Sep 2011Figure 9.3:Domestic spot prices in China: Jan 2011 - Sep 2011Figure 9.4:Bulk premium zircon price forecasts to 2015 (real terms)Figure 9.5:Global zircon concentrate imports pricing: Aug 2009-	Figure 7.5:	Origin of identified zircon concentrate shipments
Figure 8.1:Changes in zircon demand: 2008-2011Figure 8.2:Base case global zircon supply/demand: 2000-2015Figure 9.1:Australian FOB bulk zircon prices US\$: 1970-2010Figure 9.2:Identified zircon import prices for China and Europe: Jul 2009-Sep 2011Figure 9.3:Domestic spot prices in China: Jan 2011 - Sep 2011Figure 9.4:Bulk premium zircon price forecasts to 2015 (real terms)Figure 9.5:Global zircon concentrate imports pricing: Aug 2009-	Figure 7.6:	
Figure 8.2:Base case global zircon supply/demand: 2000-2015Figure 9.1:Australian FOB bulk zircon prices US\$: 1970-2010Figure 9.2:Identified zircon import prices for China and Europe: Jul 2009-Sep 2011Figure 9.3:Domestic spot prices in China: Jan 2011 - Sep 2011Figure 9.4:Bulk premium zircon price forecasts to 2015 (real terms)Figure 9.5:Global zircon concentrate imports pricing: Aug 2009-	Figure 7.7:	Zircon supply outlook to 2015
Figure 9.1:Australian FOB bulk zircon prices US\$: 1970-2010Figure 9.2:Identified zircon import prices for China and Europe: Jul 2009-Sep 2011Figure 9.3:Domestic spot prices in China: Jan 2011 - Sep 2011Figure 9.4:Bulk premium zircon price forecasts to 2015 (real terms)Figure 9.5:Global zircon concentrate imports pricing: Aug 2009-	Figure 8.1:	Changes in zircon demand: 2008-2011
Figure 9.2:Identified zircon import prices for China and Europe: Jul 2009-Sep 2011Figure 9.3:Domestic spot prices in China: Jan 2011 - Sep 2011Figure 9.4:Bulk premium zircon price forecasts to 2015 (real terms)Figure 9.5:Global zircon concentrate imports pricing: Aug 2009-	Figure 8.2:	Base case global zircon supply/demand: 2000-2015
Jul 2009-Sep 2011Figure 9.3:Domestic spot prices in China: Jan 2011 - Sep 2011Figure 9.4:Bulk premium zircon price forecasts to 2015 (real terms)Figure 9.5:Global zircon concentrate imports pricing: Aug 2009-	Figure 9.1:	Australian FOB bulk zircon prices US\$: 1970-2010
Figure 9.4: Bulk premium zircon price forecasts to 2015 (real terms) Figure 9.5: Global zircon concentrate imports pricing: Aug 2009-	Figure 9.2:	
terms) Figure 9.5: Global zircon concentrate imports pricing: Aug 2009-	Figure 9.3:	Domestic spot prices in China: Jan 2011 - Sep 2011
	Figure 9.4:	
	Figure 9.5:	



ABOUT TZMI

TZ Minerals International (TZMI) is a global, independent consulting and publishing company with offices in Australia, the US, Europe, Africa and China. The strength of TZMI's consulting services stems from extensive practical experience in the mineral sands, titanium dioxide and coatings industries and from a comprehensive database, which has been built up over many years.

TZMI has proven expertise gained from our consultants having many years of direct operating experience in the industry at chief executive, senior operational, analytical and marketing roles. TZMI's publications and data services support the consulting activities and ensure up-to-date, high quality and comprehensive data, analysis and information across the mineral sands, zircon and TiO₂ pigment industries.

TZMI provides operational and technical expert advice on many areas including:

- Mergers and acquisitions
- · Market assessments and industry analysis
- Due diligence
- Pre-feasibility studies incl. preliminary capital and operating cost estimation
- Competitive cost analysis and benchmarking
- Technical reviews and audits
- Resource assessments
- · Physical separation test work
- Flowsheet development
- · Customised data analysis and reporting.

ORDER FORM

Email completed form to marketing@tzmi.com or fax to +61 8 9359 6050.

	Price excluding GST	Qty	Amount
The Global Zircon Industry - Challenging new dynamics (electronic format only - pdf)	A\$7,500	1	A\$
Additional copies	A\$1,875		A\$
Hard copy surcharge (per copy) - includes postage and handling	A\$200		A\$
For Australian subscribers: 10% GST will be added to listed price.	Total		A\$

PAYMENT OPTIONS

Credit Card (option available for all subscribers)

Credit Card	Visa	Mastercard Amex	Diners Total Valu	e \$
Expiry Date	Card No.		Securi	ty Code
Cardholders Name			Cardholders Signature	

All Subscribers	Australian Subscribers	
Electronic Funds or Telegraphic Transfers: ANZ Bank International Services, Australia Account Name: TZ Minerals International Pty Ltd BSB: 016 498 Acc No: 2555 45838 Swift: ANZBAU3M	Cheque: Payable to TZ Minerals International Pty Ltd Mail cheque and Order Form to: TZ Minerals International Pty Ltd PO Box 1252, Victoria Park East WA 6981	
Ref No: Purchaser name and invoice number	International Subscribers Bank draft drawn on US Bank by airmail: TZ Minerals International Pty Ltd PO Box 1252 Victoria Park East WA 6981 Australia	

CONTACT DETAILS

Name	
Position	Company
Postal Address	
Telephone () Fax	() Mobile/Cell ()
Email	Website