



Freedonia Focus Reports
US Collection

Industrial Silica Sand: United States

August 2018



CLICK TO ORDER
FULL REPORT
BROCHURE
CLICK TO ORDER
FULL REPORT

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Market Environment	4
Historical Trends	4
Key Economic Indicators	5
Environmental & Regulatory Factors	6
NAFTA Outlook	8
3. Segmentation & Forecasts	10
Markets	10
Hydraulic Fracturing	12
Foundry	12
Container Glass	13
Flat Glass	13
Other Glass	14
Building Products	14
Chemicals	15
Other Markets	15
4. Industry Structure	17
Industry Characteristics	17
Market Leaders	18
Covia	19
Hi-Crush Partners	19
US Silica	20
5. About This Report	21
Scope	21
Sources	21
Industry Codes	22
Freedonia Methodology	22
Resources	24

List of Tables & Figures

Figure 1 Key Trends in the US Industrial Silica Sand Market, 2017 – 2022	3
Figure 2 US Industrial Silica Sand Demand Trends, 2007 – 2017	4
Table 1 Key Indicators for US Industrial Silica Sand Demand, 2007 – 2022 (2009US\$ bil)	5
Figure 3 NAFTA Industrial Silica Sand Demand by Country, 2017 (%)	8
Figure 4 US Industrial Silica Sand Demand by Market, 2007 – 2022 (mil m tons)	10
Table 2 US Industrial Silica Sand Demand by Market, 2007 – 2022 (mil m tons)	10
Table 3 US Industrial Silica Sand Supply & Demand, 2007 – 2022 (mil m tons)	11
Figure 5 US Industrial Silica Sand Demand by Market, 2007 – 2022 (%)	16
Table 4 Selected Industrial Silica Sand Suppliers Operating in the US	18
Table 5 NAICS & SIC Codes Related to Industrial Silica Sand	22

About This Report

Scope

This report forecasts to 2022 US industrial silica sand demand and production in metric tons. Total demand is also forecasted in nominal US dollars at the manufacturer level. Total demand by volume is segmented by market in terms of:

- hydraulic fracturing
- foundry
- container glass
- flat glass
- other glass such as decorative glass, glass ceramics, and glass fiber
- building products
- chemicals
- other markets such as abrasives, ceramic production, and industrial filler

To illustrate historical trends, total demand is provided in annual series from 2007 to 2017; total production, total demand by value, and the various demand segments by volume are reported at five-year intervals for 2007, 2012, and 2017.

This report analyzes the market for industrial silica sand, also referred to as silica sand, industrial sand, and quartz sand. Both captive silica sand quarried for use within a company's operations (such as for glass manufacturing) and silica sand sold on the open market are covered. Additionally, the scope of this report encompasses the raw sand component of coated sand; however, the value added from the coating process is excluded. Construction sand, which features lower silica content relative to industrial sand, is excluded from this report.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Industrial Silica Sand: United States (FF65031) is based on [Global Industrial Silica Sand](#), a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies

About This Report

- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 5 | NAICS & SIC Codes Related to Industrial Silica Sand

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industrial Classification	
212322	Industrial Sand Mining	1446	Industrial Sand

Source: US Census Bureau

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term

About This Report

historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

Resources

The Freedonia Group

Global Industrial Silica Sand, August 2018

Freedonia Industry Studies

Global Flat Glass Market, March 2018

Global Caps & Closures Market, September 2017

Proppants Market in North America, July 2017

World Insulation, July 2016

Freedonia Focus Reports

Abrasives: United States

Crude Petroleum: United States

Fabricated Metal Products: United States

Flat Glass: United States

Insulation: United States

Natural Gas: United States

Refined Petroleum Products: United States

Steel Mill Products: United States

Freedonia Custom Research

Trade Publications

Ceramic Industry

Foundry Management & Technology

Foundry Trade Journal International

Foundry-Planet

Glass Magazine

Global Casting Magazine

Industrial Minerals

Oil & Gas Journal

Agencies & Associations

Container Recycling Institute

Industrial Minerals Association – North America

National Industrial Sand Association

Occupational Safety and Health Administration

United Nations Statistics Division

United States Census Bureau

United States Geological Survey

World Steel Association