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Industrial Clays: United States

November 2018



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About This Report

Scope

This report forecasts to 2022 US industrial clays demand and production in metric tons. Total demand is segmented by product in terms of:

- common clay
- kaolin
- bentonite
- fuller's earth
- ball clay
- fire clay

Total demand is also segmented by application as follows:

- building products
- fillers, extenders, and binders
- absorbents
- ceramics
- refractories and other applications such as drilling mud, foundry sand bond, and iron ore pelletizing

To illustrate historical trends, total demand, total production, the various demand segments, and trade are provided in annual series from 2007 to 2017.

This report excludes clay used for such purposes as construction fill, landfill caps, and landscaping that is mined by companies that do not operate mills or plants.

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 Clays: United States (FF65039) represents the synthesis and analysis of data from various secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental organizations
- trade associations and their publications

About This Report

- 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 10 | NAICS & SIC Codes Related to Industrial Clays

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industrial Classification	
212324	Kaolin and Ball Clay Mining	1455	Kaolin and Ball Clay
212325	Clay and Ceramic and Refractory Minerals Mining	1459	Clay, Ceramic, and Refractory Minerals, NEC
327111	Vitreous China Plumbing Fixture and China and Earthenware Bathroom Accessories Manufacturing	3251	Brick and Structural Clay Tile
327112	Vitreous China, Fine Earthenware, and Other Pottery Product Manufacturing	3253	Ceramic Wall and Floor Tile
327113	Porcelain Electrical Supply Manufacturing	3255	Clay Refractories
327121	Brick and Structural Clay Tile Manufacturing	3259	Structural Clay Products, NEC
327122	Ceramic Wall and Floor Tile Manufacturing	3261	Vitreous Plumbing Fixtures
327123	Other Structural Clay Product Manufacturing	3262	Vitreous China Table and Kitchenware
327124	Clay Refractory Manufacturing	3263	Fine Earthenware (Whiteware) Table & Kitchen Articles
		3264	Porcelain Electrical Supplies
		3269	Pottery Products, NEC
		3295	Minerals, Ground or Treated

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.

About This Report

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 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.

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Resources

The Freedonia Group

Freedonia Industry Studies

Global Mining Equipment, October 2018

Global Refractories, January 2018

Drilling Fluids & Chemicals Market in the US, May 2017

Freedonia Focus Reports

Abrasives: United States

Construction: United States

Crude Petroleum: United States

Fabricated Metal Products: United States

Flat Glass: United States

Insulation: United States

Mining & Quarrying: United States

Natural Gas: United States

Perlite & Vermiculite: United States

Refined Petroleum Products: United States

Steel Mill Products: United States

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Ceramic Industry

Clays and Clay Minerals

Industrial Minerals

The Journal of Light Construction

Agencies & Associations

The American Ceramic Society

The Brick Industry Association

The Clay Minerals Society

Industrial Minerals Association – North America

National Association of Home Builders

The National Mining Association

United States Advanced Ceramics Association

United States Census Bureau

United States Geological Survey

United States International Trade Commission