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# Global Abrasives

May 2019



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# About This Report

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## Scope

This report forecasts to 2023 global demand for abrasives by product, market, and major world region in nominal US dollars at the manufacturer level. Product segments include:

- coated
- bonded
- loose grains and powders
- metallic

Reported markets encompass:

- machinery manufacturing
- transportation equipment
- electrical and electronic equipment
- other durable goods such as fabricated metals, primary metals, and nonmetallic mineral products
- cleaning and maintenance
- other markets such as construction, resource extraction, and nondurable goods manufacturing

Major world regions include North America, Western Europe, Asia/Pacific, and all other regions.

To illustrate historical trends, world, product, market, and regional demand (including product and market segments) are provided for 2008, 2013, and 2018. Finally, global production is segmented by major world region and provided for 2008, 2013, 2018, and 2023.

Excluded from the scope of this report are abrasive-tipped cutting tools like drill bits, milling cutters, and saw blades. Also excluded are fracking materials (silica sand) and all other products that use abrasive materials for nonabrasive applications.

For any given historical year, US dollar amounts are obtained from values expressed in the applicable local currency. These local currency values are converted to US dollars at the average annual exchange rate for that year. For forecast years, the US dollar amounts assume the same annual exchange rate as that prevailing in 2018.

Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Global Abrasives* (FW65025) is based on 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, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and 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 10 | NACE Codes Related to Abrasives**

NACE Code	Definition
08992200	Industrial diamonds, unworked or simply sawn, cleaved or bruted; pumice stone; emery; natural corundum, natural garnet and other natural abrasives
23911120	Millstones, grindstones, grinding wheels and the like, without frameworks, of agglomerated synthetic or natural diamond
23911130	Millstones, grindstones, grinding wheels and the like, without frameworks, of artificial abrasives, with binder of synthetic or artificial resin, reinforced
23911140	Millstones, grindstones, grinding wheels and the like, without frameworks, of artificial abrasives, with binder of synthetic or artificial resin, non-reinforced
23911150	Millstones, grindstones, grinding wheels and the like, without frameworks, of artificial abrasives, with binder of ceramics or silicates
23911190	Other millstones, grindstones, grinding wheels and the like, without frameworks; hand sharpening or polishing stones
23911230	Natural or artificial abrasive powder or grain, on a base of woven textile fabric only
23911250	Natural or artificial abrasive powder or grain, on a base of paper or paperboard only
23911290	Natural or artificial abrasive powder or grain on a base (excluding on a base of woven textile only, on a base of paper or paperboard only)
23991500	Artificial corundum (excluding mechanical mixtures)
24421200	Aluminium oxide (excluding artificial corundum)
25733013	Files, rasps and similar tools (excluding punches and files for machine tools)
25991280	Iron or steel wool, pot scourers and scouring or polishing pads, and gloves and the like

Source: European Commission

**Table 11 | NAICS & SIC Codes Related to Abrasives**

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
327910	Abrasive Product Manufacturing	3291	Abrasive Products

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 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

*Global Abrasives*

### Freedonia Industry Studies

*Global Bearings*

*Global Industrial & Institutional Cleaning Chemicals Market*

*Global Industrial Fastener Market*

*Global Industrial Silica Sand*

*Global Power Tools*

*Global Refractory Markets*

*Industrial & Institutional (I&I) Cleaning Chemicals in the US*

*Industrial Fasteners*

*Power Tools in the US*

*Specialty Silicas*

### Freedonia Focus Reports

*Fabricated Metal Products: United States*

*Industrial Fasteners: United States*

*Industrial Silica Sand: Canada*

*Industrial Silica Sand: United States*

*Machine Tools: United States*

*Manufacturing: United States*

*Power Tools: Canada*

*Power Tools: United Kingdom*

*Power Tools: United States*

*Silicon: United States*

*Transport Equipment: United States*

### Freedonia Custom Research

### Trade Publications

*American Machinist*

*Cutting Tool Engineering*

*Fabricating & Metalworking*

*Finer Points*

*Industrial Minerals*

### Agencies & Associations

Bureau of Foreign Trade (Taiwan)

China Abrasive Association

## About This Report

Coated Abrasives Fabricators Association  
Eurostat  
Federation of European Producers of Abrasives  
Instituto Brasileiro de Geografia e Estatística  
Instituto Nacional de Estadística (Spain)  
Instituto Nacional de Estadística y Geografía (Mexico)  
International Monetary Fund  
Ministry of Economy, Trade, and Industry (Japan)  
National Institute of Statistics and Economic Studies (France)  
Organisation for Economic Co-operation and Development  
Statistics Canada  
Turkish Statistical Institute  
Unified Abrasives Manufacturers' Association  
United Nations Comtrade  
United States Census Bureau  
United States Geological Survey  
World Bank