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# Global Industrial Silica Sand

August 2018



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# About This Report

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## Scope

This report forecasts to 2022 global demand for industrial silica sand by market and major world region in metric tons. Reported markets encompass:

- glass
- hydraulic fracturing
- foundry
- building products
- chemicals
- other markets such as abrasives, recreation, and water filtration

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

To illustrate historical trends, world, market, and regional demand (including market segments) are provided for 2007, 2012, and 2017. Finally, global production is segmented by major world region and provided for 2007, 2012, 2017, and 2022.

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. For the purposes of this report, captive sales are included in market share totals. 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.

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 2017.

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

*Global Industrial Silica Sand* (FW65031) 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 including:

- firms participating in the industry, and their suppliers and customers

## About This Report

- government/public agencies
- 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 9 | 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

Table 10 | HS Codes Related to Industrial Silica Sand

| HS Code | Definition   |
|---------|--|
| 250510  | Sands; natural, silica, and quartz sands, whether or not colored |

Source: United Nations Statistics Division

Table 11 | NACE Codes Related to Industrial Silica Sand

| Nace Code  | Definition                                      |
|------------|---|
| 08.12.1150 | Silica sands (quartz sands or industrial sands) |

Source: European Commission

## 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,

## About This Report

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 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

### Freedonia Focus Reports

*Abrasives: United States*

*Crude Petroleum: United States*

*Fabricated Metal Products: United States*

*Flat Glass: Canada*

*Global Flat Glass*

*Steel Mill Products: United States*

*World Abrasives*

### 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

Associations consulted for this study include:

Container Recycling Institute

European Association of Industrial Silica Producers

European Container Glass Federation

European Network on Silica

Glass for Europe

Industrial Minerals Association – Europe

Industrial Minerals Association – North America

National Industrial Sand Association

World Steel Association

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Agencies and other organizations consulted for this study include:

European Commission

United States Statistics Division

United States Census Bureau

United States Geological Survey