World Kaolin

Industry Study with Forecasts for 2015 & 2020

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World Kaolin
Industry Study with Forecasts for 2015 & 2020

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World market to rise 3.7% per year through 2015

The world market for kaolin is projected to grow 3.7 percent per year through 2015 to 28.4 million metric tons, valued at nearly $4.0 billion. This represents a significant acceleration from the relative stagnation of the 2005 to 2010 period. Growth in kaolin demand will be fueled by a generally stronger economic climate worldwide, with especially rapid growth in developing economies. Kaolin demand in developed economies is forecast to recover from declines seen between 2005 and 2010 and post moderate growth going forward.

China, India to represent largest kaolin growth

The largest gains will be seen in China, which alone will account for 37 percent of the growth in worldwide kaolin demand between 2010 and 2015. Currently the world's second largest consumer of kaolin, China will experience large-scale manufacturing growth and easily overtake the US to become the world's largest kaolin market by 2015. India will also see a sizable increase in kaolin demand, fueled by an economy showing significant development across the board. India's growth in kaolin demand will represent an acceleration of the already rapid pace of the 2005 to 2010 period, with the fastest growth occurring in the country's paper industry.

Kaolin demand in paper, ceramics to grow faster

From 2010 to 2015, demand for kaolin in all its major industrial uses is expected to increase faster than in the 2005 to 2010 period. The paper market, which is the largest market for kaolin, will recover from declines posted over the previous decade. Kaolin's market share in paper production materials was hurt in recent years by rising competition from alternative materials, most notably calcium carbonate. That competition is expected to moderate going forward, as the market structure settles into a new norm. By 2010, most of the economically viable substitution of other materials for kaolin had already taken place. Combined with expanding paper and paperboard production in developing regions, the stabilization of kaolin's market share in the paper industry will allow the global market for kaolin in paper to rise nominally through 2015. The second leading usage for kaolin is ceramics production, which includes sanitaryware, tableware and tile. Ceramics was the fastest growing market for kaolin from 2005 to 2010, and is forecast to continue to grow quickly.
东亚/太平洋

能源效率；缺乏对健康护理的获取，尤其是农村人口；以及，在未来的几十年，人口快速老龄化。

中国：供应与需求

中国的高岭土市场在2010年达到近三百万公吨，仅次于美国。中国在过去十年的经济的繁荣，其2000年至2010年的高岭土需求增长率高达10%。预计未来，中国经济将在2015年之前将趋于平缓，但中国将仍然是全球高岭土市场增长最快的国家。预测期间，中国高岭土需求预计将以每年9.7%的速度增长，达到4740,000公吨，成为全球最大的高岭土市场。

中国是高岭土净出口国，但2000年至2010年，中国的进口和出口均以双位数增长。中国出口低等级的高岭土用于陶瓷和其他市场，而进口高等级的高岭土用于满足造纸行业的需求。中国出口主要目的地为亚洲/太平洋地区，如日本，台湾和韩国是重要的出口目的地。出口至该地区的高岭土主要来自美国，而进口主要来自巴西。


### 表VI-3

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>GDP (bil 2009$)</td>
<td>3730</td>
<td>5941</td>
<td>10100</td>
<td>15110</td>
<td>21600</td>
</tr>
<tr>
<td>Manu. Value Added (bil 2009$)</td>
<td>901</td>
<td>1665</td>
<td>3366</td>
<td>5290</td>
<td>7820</td>
</tr>
<tr>
<td>m ton/mil $ GDP</td>
<td>0.30</td>
<td>0.30</td>
<td>0.30</td>
<td>0.31</td>
<td>0.31</td>
</tr>
<tr>
<td>m ton/mil $ MVA</td>
<td>1.24</td>
<td>1.08</td>
<td>0.89</td>
<td>0.90</td>
<td>0.85</td>
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<td>Kaolin Demand (000 metric tons)</td>
<td>1120</td>
<td>1800</td>
<td>2990</td>
<td>4740</td>
<td>6640</td>
</tr>
<tr>
<td>- imports</td>
<td>270</td>
<td>420</td>
<td>540</td>
<td>650</td>
<td>870</td>
</tr>
<tr>
<td>+ exports</td>
<td>600</td>
<td>980</td>
<td>1150</td>
<td>1640</td>
<td>2250</td>
</tr>
<tr>
<td>Kaolin Shipments (000 metric tons)</td>
<td>1450</td>
<td>2360</td>
<td>3600</td>
<td>5730</td>
<td>8020</td>
</tr>
</tbody>
</table>

### 图VIII-1

世界高岭土市场份额，2010年（$3.2亿）

- 其他 51.7%
- 比利时 SCR-Sibelco 38.1%
- 台湾 5.7%
- 中国 5.5%
- 巴西 5.4%
- 澳大利亚 3.8%
- 越南 7.9%
- 印度尼西亚 19.9%
- 世界其他国家 15.0%
- 中国 38.1%

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Sample Profile, Table & Forecast

COMPANY PROFILES

Goonvean Limited
St Stephen
St Austell, Cornwall PL26 7QF
United Kingdom
44-1726-822-381
http://www.goonvean.com

Annual Sales: $30 million (estimated)
Employment: 180 (estimated)
Key Products: Kaolin clays for paper, ceramic & specialty applications

Goonvean is a privately held manufacturer of kaolin and aggregate byproducts. According to the Company, it is the largest producer of kaolin in Europe.

The Company participates in the world kaolin industry via the production of kaolin for paper, ceramic and specialty applications. Goonvean manufactures its kaolin in both a dry powder form with a two-percent moisture content and a noodle form that has a moisture content of ten to eighteen percent. The Company distributes its kaolin products in 25- or 50-kilogram bags, bulk container bags, wagon loads or ship loads.

For paper applications, Goonvean’s kaolin is available through the PLATINUM series and comprises coating and filler clays. PLATINUM coating kaolin clays include the PLATINUM COTE fine particle grade, which has high-brightness properties and is used to impart a satin finish to paper; and the PLATINUM ROTO grade, which is made using high aspect-ratio kaolin particles and is employed as a coating pigment for rotogravure-printed paper. Among the Company’s PLATINUM filler clays are the PLATINUM TRIMAX series, which are high-brightness kaolin clays that are used to impart a satin finish to paper.

---Section VI, pg. 110

TABLE VI-4
CHINA: KAOLIN DEMAND BY MARKET
(Thousand metric tons)

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>GDP (bil 2009$)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>m tons kaolin/mil $ GDP</td>
<td>0.30</td>
<td>0.30</td>
<td>0.30</td>
<td>0.31</td>
<td>0.31</td>
</tr>
<tr>
<td>Kaolin Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paper</td>
<td>259</td>
<td>560</td>
<td>1082</td>
<td>1540</td>
<td>2060</td>
</tr>
<tr>
<td>Ceramics</td>
<td>650</td>
<td>850</td>
<td>1370</td>
<td>2420</td>
<td>3500</td>
</tr>
<tr>
<td>Other</td>
<td>211</td>
<td>390</td>
<td>538</td>
<td>780</td>
<td>1080</td>
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<tr>
<td>$/metric ton</td>
<td>89</td>
<td>117</td>
<td>137</td>
<td>143</td>
<td>158</td>
</tr>
<tr>
<td>Kaolin Demand (mil $)</td>
<td>100</td>
<td>210</td>
<td>410</td>
<td>680</td>
<td>1050</td>
</tr>
</tbody>
</table>

“Demand for kaolin in China is headed by the ceramics market. China is the world’s largest producer of ceramic goods, and ceramics production has more than doubled in the past decade as the industry has become more export-oriented. Within the ceramics market, the major uses for kaolin are in sanitaryware and tableware. Demand for kaolin in ceramics grew 7.7 percent per year from 2000 to 2010.”

---Section VI, pg. 110
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