



[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table & Chart 5](#)

[Sample Profile, Table & Forecast 6](#)

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World Kaolin

Industry Study with Forecasts for **2015 & 2020**

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The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

www.freedoniagroup.com

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
World Economic Overview	4
Recent Historical Trends.....	5
World Economic Outlook.....	6
World Demographic Overview	10
Global Paper & Paperboard Production ..	12
Manufacturing Value Added.....	16
Legal & Regulatory Overview.....	17
Pricing Trends	19

OVERVIEW

General	23
Demand by Region	25
Demand by Market.....	27
Paper	29
Ceramics.....	33
Other Markets.....	35
Refractories.....	37
Paint.....	38
Rubber	38
All Other Markets	39
World Kaolin Production.....	40
International Trade	43

NORTH AMERICA

General	46
Supply & Demand.....	47
Demand by Market.....	49
United States	50
Canada	55
Mexico	58

WESTERN EUROPE

General	63
Supply & Demand.....	64
Demand by Market.....	66
Germany.....	68
Finland.....	73
Italy	77
Spain	80
Sweden	85
France.....	88

United Kingdom.....	92
Other Western Europe	96

ASIA/PACIFIC

General	101
Supply & Demand.....	102
Demand by Market.....	104
China	106
Japan.....	112
South Korea	116
Malaysia	121
Thailand	125
India	128
Other Asia/Pacific	132

OTHER REGIONS

Central & South America	137
Supply & Demand.....	138
Demand by Market.....	140
Brazil.....	141
Other Central & South America	146
Eastern Europe	149
Supply & Demand.....	151
Demand by Market.....	152
Russia	154
Czech Republic	158
Other Eastern Europe	162
Africa/Mideast.....	165
Supply & Demand.....	167
Demand by Market.....	168
Turkey.....	170
Other Africa/Mideast	173

INDUSTRY STRUCTURE

General	178
Market Composition.....	179
Market Share	180
Mining & Manufacturing.....	183
Kaolin Reserves	185
Distribution	187
Marketing	188
Cooperative Agreements.....	189

COMPANY PROFILES

Ashapura Group	192
----------------------	-----

BASF SE.....	193
Daleco Resources	196
Eczaciba i Holding	197
English Indian Clays	198
Erdene Resource Development.....	200
Goonvean Limited	201
Gulf Alumina	203
i-minerals incorporated.....	204
Imerys SA	205
Jiangxi Sincere Mineral Industry.....	210
Kale Group	211
KaMin LLC.....	212
Kaolin AD	214
Kerala Clays and Ceramic Products	216
Lasselsberger GmbH.....	217
Longyan Kaolin Clay	219
Minotaur Exploration	220
MOTA Ceramic Solutions	221
Quarzwerke GmbH	222
SCR-Sibelco NV	224
Sedlecky Kaolin as	226
SOKA Societe Kaoliniere Armoricaine..	227
Stephan Schmidt.....	228
Tecumseh Professional Associates	229
Thiele Kaolin	230
Vale SA.....	232
Veneta Mineraria	234
Xatico Sarl	235

List of Charts

MARKET ENVIRONMENT

1 Average Kaolin Prices by Market, 2000-2020	22
---	----

OVERVIEW

1 World Kaolin Demand by Market, 2010.....	29
2 World Kaolin Shipments by Region, 2000-2020.....	43

INDUSTRY STRUCTURE

1 World Kaolin Market Share, 2010..	181
-------------------------------------	-----

List of Tables

EXECUTIVE SUMMARY

1 Summary Table.....3

MARKET ENVIRONMENT

1 World Gross Domestic Product
by Region 10
2 World Population by Region 12
3 World Paper & Paperboard
Production by Region..... 15
4 World Manufacturing Value Added .. 17
5 World Average Kaolin Prices
by Region & Market 21

OVERVIEW

1 World Kaolin Demand by Region 27
2 World Kaolin Demand by Market..... 28
3 Paper Market for Kaolin by Region . 32
4 Ceramics Market for Kaolin
by Region 35
5 Other Markets for Kaolin
by Region 37
6 World Kaolin Shipments by Region . 42
7 World Kaolin Net Exports
by Region 45

NORTH AMERICA

1 North America: Kaolin
Supply & Demand 48
2 North America: Kaolin
Demand by Market..... 50
3 United States: Kaolin
Supply & Demand 53
4 United States: Kaolin
Demand by Market..... 54
5 Canada: Kaolin Supply & Demand... 57
6 Canada: Kaolin Demand by Market.. 58
7 Mexico: Kaolin Supply & Demand ... 61
8 Mexico: Kaolin Demand by Market.. 62

WESTERN EUROPE

1 Western Europe: Kaolin
Supply & Demand 66
2 Western Europe: Kaolin
Demand by Market..... 68

3 Germany: Kaolin Supply & Demand . 71
4 Germany: Kaolin Demand
by Market..... 72
5 Finland: Kaolin Supply & Demand .. 75
6 Finland: Kaolin Demand by Market . 76
7 Italy: Kaolin Supply & Demand 79
8 Italy: Kaolin Demand by Market..... 80
9 Spain: Kaolin Supply & Demand..... 83
10 Spain: Kaolin Demand by Market.... 84
11 Sweden: Kaolin Supply & Demand .. 87
12 Sweden: Kaolin Demand by Market . 88
13 France: Kaolin Supply & Demand.... 91
14 France: Kaolin Demand by Market... 92
15 United Kingdom: Kaolin
Supply & Demand 95
16 United Kingdom: Kaolin
Demand by Market..... 96
17 Other Western Europe: Kaolin
Supply & Demand 99
18 Other Western Europe: Kaolin
Demand by Market..... 100

ASIA/PACIFIC

1 Asia/Pacific: Kaolin
Supply & Demand 104
2 Asia/Pacific: Kaolin Demand
by Market..... 106
3 China: Kaolin Supply & Demand... 110
4 China: Kaolin Demand by Market.. 112
5 Japan: Kaolin Supply & Demand .. 115
6 Japan: Kaolin Demand by Market . 116
7 South Korea: Kaolin
Supply & Demand 119
8 South Korea: Kaolin
Demand by Market..... 120
9 Malaysia: Kaolin
Supply & Demand 123
10 Malaysia: Kaolin Demand
by Market..... 124
11 Thailand: Kaolin
Supply & Demand 127
12 Thailand: Kaolin Demand
by Market..... 128
13 India: Kaolin Supply & Demand ... 131
14 India: Kaolin Demand by Market .. 132

15 Other Asia/Pacific: Kaolin
Supply & Demand 135
16 Other Asia/Pacific: Kaolin
Demand by Market..... 136

OTHER REGIONS

1 Central & South America: Kaolin
Supply & Demand 139
2 Central & South America: Kaolin
Demand by Market..... 141
3 Brazil: Kaolin Supply & Demand... 144
4 Brazil: Kaolin Demand by Market.. 145
5 Other Central & South America:
Kaolin Supply & Demand 148
6 Other Central & South America:
Kaolin Demand by Market 149
7 Eastern Europe: Kaolin
Supply & Demand 152
8 Eastern Europe: Kaolin
Demand by Market..... 153
9 Russia: Kaolin Supply & Demand.. 156
10 Russia: Kaolin Demand by Market. 157
11 Czech Republic: Kaolin
Supply & Demand 160
12 Czech Republic: Kaolin
Demand by Market..... 161
13 Other Eastern Europe: Kaolin
Supply & Demand 164
14 Other Eastern Europe: Kaolin
Demand by Market..... 165
15 Africa/Mideast: Kaolin
Supply & Demand 168
16 Africa/Mideast: Kaolin
Demand by Market..... 169
17 Turkey: Kaolin Supply & Demand.. 172
18 Turkey: Kaolin Demand by Market. 173
19 Other Africa/Mideast: Kaolin
Supply & Demand 176
20 Other Africa/Mideast: Kaolin
Demand by Market..... 177

INDUSTRY STRUCTURE

1 World Kaolin Sales for Selected
Companies, 2010..... 180
2 Selected Cooperative Agreements. 190

Growth in global demand for kaolin will benefit from rapid growth in developing economies as well as a recovery in all its major industrial uses such as paper and ceramics production.

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.

World Kaolin Demand by Region (28.4 million metric tons, 2015)



Asia/Pacific
38%

Western Europe
27%

North America
17%

Africa/Mideast
9%

Other Regions
9%

The developed nations of Japan and the US and most of the countries in Western Europe will see weak growth through 2015, although all will register recoveries in comparison to their 2005-2010 performances.

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 alterna-

tive 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.

Sample Text, Table & Chart

ASIA/PACIFIC

energy efficiency; lack of access to health care, especially in rural areas; and, over the coming decades, a rapidly aging population; and, over the coming decades, a rapidly aging

China: Supply & Demand

The Chinese kaolin market totaled nearly three million metric tons in 2010, trailing only that of the US. China's economy in the past decade, and its double-digit annual growth in between 2000 and 2010 was easily the highest in the world. Moving forward, the Chinese economy is expected to moderate its growth, but China will continue to be the fastest growing market through 2015. For the forecast period, China's demand is projected to rise 9.7 percent per year, reaching a total of 4.7 million metric tons and becoming by far the largest national market for kaolin in the world.

China is a net exporter of kaolin, but both imports and exports grew rapidly between 2000 and 2010. China generally exports lower quality kaolin for use in ceramics and other markets, while importing higher-grade kaolin in order to meet the needs of the paper industry. The majority of China's exports remain within the Asia/Pacific region, with Japan, Taiwan and South Korea the largest markets. Exports outside of the region are primarily to Brazil. Imports to China originate primarily from Brazil.

Shipments from China to the rest of the world totaled 1.1 million metric tons in 2010. Production of kaolin in China has expanded along with demand and exports, growing 10 percent from 2000 to 2010. China is the world's second largest kaolin producer, accounting for 51.7 percent of the world total in 2010. Producers of kaolin located in China include Belgium's SCR-Sibelco and such locally-based firms as Specialty Minerals, China Mineral Processing, Guangxi Baomin Minerals, Jiangxi Sincere Mineral Industry and Longyan Kaolin.

**SAMPLE
TEXT**

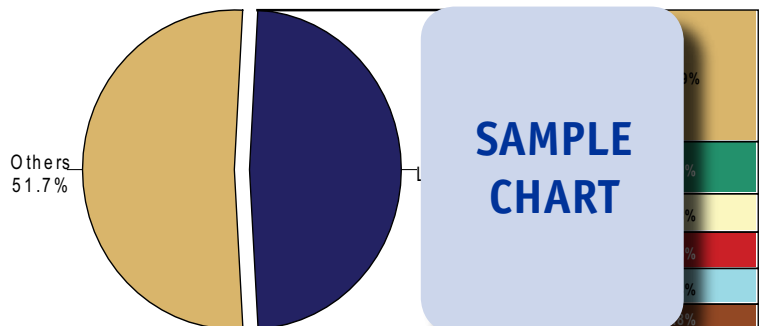
**TABLE VI-3
CHINA:
KAOLIN SUPPLY & DEMAND**

Item	2000	2005	2010	2015	2020
GDP (bil 2009\$)					
Manufacturing Value Added (bil 2009\$)					
m ton/mil \$ GDP					
m ton/mil \$ MVA					
Kaolin Demand (000 metric tons)					
- imports					
+ exports					
Kaolin Shipments (000 metric tons)					

**SAMPLE
TABLE**

CHART VIII-1

**WORLD KAOLIN MARKET SHARE, 2010
(\$3.2 billion)**

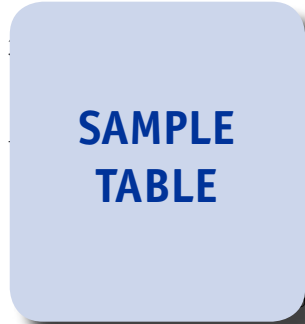


**SAMPLE
CHART**

Sample Profile, Table & Forecast

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

Item	2000	2005	2010	2015	2020
GDP (bil 2009\$)					
m tons kaolin/mil \$ GDP					
Kaolin Demand					
Paper					
Ceramics					
Other					
\$/metric ton					
Kaolin Demand (mil \$)					



COMPANY PROFILES

Goonvean Limited
 St Stephen
 St Austell, Cornwall PL26 7QF
 United Kingdom
 44-1726-822-3
 http://www.goonvean.com

Annual Sales:
 Employment:

Key Products: ... applications

Goonvean Limited is a leading manufacturer 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 18 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

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"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

OTHER STUDIES

World Refractories

Global refractory demand will rise 3.4 percent annually through 2016 to 46.3 million metric tons. Sales will grow the fastest in developing areas, reflecting the ongoing shift in heavy industry production to countries with low cost structures. The iron and steel market will remain dominant, based on a pickup in steel output. This study analyzes the 39.2 million metric ton world refractory industry, with forecasts for 2016 and 2021 by market, form, material, world region and for 23 countries. The study also evaluates company market share and profiles industry players.
 #2985 March 2013..... \$6100

Refractories

US demand for refractories is projected to grow 3.3 percent annually to \$2.6 billion in 2016. A shift toward higher-priced, advanced refractories will bolster sales value, but longer lasting, more durable refractories will limit future demand. Bricks and shapes will remain the dominant form, but will be slightly outpaced by monolithics and specialized forms. This study analyzes the \$2.2 billion US refractory industry, with forecasts for 2016 and 2021 by form, material and market. The study also evaluates company market share and profiles industry players.
 #2968 December 2012 \$4900

Corrugated & Paperboard Boxes

US demand for corrugated and paperboard boxes is forecast to increase 2.3 percent annually to \$36.5 billion in 2016. Corrugated and solid fiber boxes will remain the dominant segments and grow the fastest. Food and beverages will remain the largest market, while nonmanufacturing and durable goods markets lead gains. This study analyzes the \$32.5 billion US corrugated and paperboard box industry, with forecasts for 2016 and 2021 by material, product and market. The study also evaluates company market shares and profiles industry players.
 #2868 March 2012..... \$5100

World Rubber

Global rubber consumption is forecast to rise 4.3 percent annually through 2015 to 30.5 million metric tons, driven by increasing tire output as global motor vehicle production accelerates from a weak base. The Asia/Pacific market will remain dominant and grow the fastest. Non-tire rubber sales will outpace growth in tire rubber sales. This study analyzes the 24.8 million metric ton world rubber industry, with forecasts for 2015 and 2020 by market, world region and for 30 countries. The study also evaluates company market shares and profiles industry players.
 #2843 March 2012..... \$5800

Advanced Ceramics

Demand for advanced ceramics in the US is forecast to increase 6.0 percent annually through 2015. Transportation and electrical equipment will be the fastest growing markets, while electronic components remain the largest market. Monolithic ceramics will remain the dominant product while ceramic matrix composites grow the fastest. This study analyzes the \$10.5 billion US advanced ceramics industry, with forecasts for 2015 and 2020 by type, product, process and market. The study also evaluates company market share and profiles industry players.
 #2794 September 2011..... \$4900

About The Freedonia Group

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