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[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 Industrial Silica Sand

Industry Study with Forecasts for **2016 & 2021**

Study #2940 | October 2012 | \$5900 | 296 pages

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
World Economic Overview	4
Recent Historical Trends	5
World Economic Outlook	7
World Demographic Outlook	11
World Manufacturing Outlook	13
World Glass Outlook	16
Container Glass	16
Flat Glass	18
Glass Recycling	20
World Crude Steel Outlook	23
World Oil & Gas Outlook	25
Drilling Outlook	27
Hydraulic Fracturing & Shale Development	29
World Construction Outlook	32
Silica Sand Pricing Trends	36
Environmental & Regulatory Issues	38

WORLD SUPPLY & DEMAND

General	42
Regional Overview	43
Demand	43
Production	47
International Trade	49
Demand by Market	50
Glass	52
Container Glass	55
Flat & Other Glass	57
Foundries	60
Hydraulic Fracturing	62
Building Products	66
Chemicals	68
Other	70

NORTH AMERICA

General	74
Silica Sand Supply & Demand	75
Silica Sand Outlook	78
United States	80
Canada	87
Mexico	93

WESTERN EUROPE

General	98
Silica Sand Supply & Demand	99
Silica Sand Outlook	102
Germany	104

Italy	109
France	112
Spain	116
United Kingdom	121
Other Western Europe	125

ASIA/PACIFIC

General	131
Silica Sand Supply & Demand	132
Silica Sand Outlook	135
China	137
Japan	144
India	149
South Korea	153
Australia	158
Other Asia/Pacific	162

OTHER REGIONS

Central & South America	168
Silica Sand Supply & Demand	169
Silica Sand Outlook	171
Brazil	173
Other Central & South America	178
Eastern Europe	183
Silica Sand Supply & Demand	184
Silica Sand Outlook	186
Russia	188
Poland	193
Other Eastern Europe	198
Africa/Mideast	202
Silica Sand Supply & Demand	204
Silica Sand Outlook	206
Turkey	208
South Africa	213
Other Africa/Mideast	217

INDUSTRY STRUCTURE

General	222
Market Composition	223
Market Share	224
Production	228
Marketing	230
Distribution	230
Cooperative Agreements	231
Mergers & Acquisitions	232

COMPANY PROFILES

Adwan Chemical Industries	234
Auschina Industrial	235
Badger Mining	235
Bathgate Silica Sand	238

Caobar SA	239
Carmeuse Group	240
CEMEX SAB	241
Duchang County Xinshiji Sculpt Materials	243
Earth Commodities Bundaberg	243
EOG Resources	245
EUROQUARZ GmbH	246
Fairmount Minerals	247
flexFrac Proppant Sand Suppliers	251
FTS International Services	252
Grupo Villar Mir SLU	254
Gruppo Minerali Maffei	255
Haryana Ceramic & Allied Products	257
Hedrick Industries	258
Holcim Limited	259
JSC KGOK	260
Lianyungang Dawnbright International	261
Manley Brothers of Indiana	262
Momentive Performance Materials	264
Nugent Sand	266
Pattison Sand	267
Pioneer Natural Resources	268
Preferred Sands	270
Quarzwerke GmbH	271
Saint-Gobain	275
SCR-Sibelco NV	277
Short Mountain Silica	281
Simplot (JR) Company	282
Taiwan Glass	283
Türkiye Sise ve Cam Fabrikaları AS	284
US Silica Holdings	285
Xinyi Golden Ruite Quartz Materials	288
Xuzhou Shihang Silica Sand	289
Zhuzhou Kibing Group	290
Other Companies in the World Industry	291

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table	3
-----------------------	---

MARKET ENVIRONMENT

1 World Gross Domestic Product by Region ..	11
2 World Population by Region	13
3 World Manufacturing Value Added by Region	15
4 World Container Glass Demand by Region & Product	18
5 World Flat Glass Production by Region	20

(continued on following page)

[Click here to purchase online](#)

List of Tables/Charts

(continued from previous page)

- 6 World Crude Steel Production by Region...25
- 7 World Oil & Gas Output by Region.....27
- 8 World Oil & Gas Wells Drilled by Region ...29
- 9 World Construction Expenditures
by Type & Region.....36
- 10 World Silica Sand Prices38

WORLD SUPPLY & DEMAND

- 1 World Industrial Silica Sand
Demand by Region46
- Cht World Silica Sand Demand
by Region, 201147
- 2 World Silica Sand Production by Region ...49
- 3 World Silica Sand Net Exports by Region ..50
- 4 World Silica Sand Demand by Market51
- Cht World Silica Sand Demand
by Market, 201152
- 5 World Glass Demand for Silica Sand
by Type & Region.....55
- 6 World Container Glass Demand
for Silica Sand by Region57
- 7 World Flat & Other Glass Demand
for Silica Sand by Region59
- 8 World Foundry Demand for
Silica Sand by Region62
- 9 World Hydraulic Fracturing Demand
for Silica Sand by Region66
- 10 World Building Products Demand
for Silica Sand by Region68
- 11 World Chemical Demand for
Silica Sand by Region70
- 12 World Demand for Silica Sand Used
in Other Markets by Region73

NORTH AMERICA

- 1 North America: Silica Sand
Supply & Demand.....77
- Cht North America: Silica Sand
Demand by Country, 2011.....78
- 2 North America: Silica Sand
Demand by Market79
- Cht North America: Silica Sand
Demand by Market, 2011.....80
- 3 United States: Silica Sand
Supply & Demand.....84
- 4 United States: Silica Sand
Demand by Market87
- 5 Canada: Silica Sand Supply & Demand.....90
- 6 Canada: Silica Sand Demand by Market ...92
- 7 Mexico: Silica Sand Supply & Demand.....95
- 8 Mexico: Silica Sand Demand by Market....97

WESTERN EUROPE

- 1 Western Europe: Silica Sand
Supply & Demand..... 101
- Cht Western Europe: Silica Sand
Demand by Country, 2011..... 102
- 2 Western Europe: Silica Sand
Demand by Market 103
- Cht Western Europe: Silica Sand
Demand by Market, 2011..... 104
- 3 Germany: Silica Sand Supply & Demand. 107
- 4 Germany: Silica Sand Demand by Market 108
- 5 Italy: Silica Sand Supply & Demand..... 111
- 6 Italy: Silica Sand Demand by Market..... 112
- 7 France: Silica Sand Supply & Demand .. 115
- 8 France: Silica Sand Demand by Market .. 116
- 9 Spain: Silica Sand Supply & Demand..... 119
- 10 Spain: Silica Sand Demand by Market.... 120
- 11 United Kingdom: Silica Sand
Supply & Demand..... 123
- 12 United Kingdom: Silica Sand
Demand by Market 125
- 13 Other Western Europe: Silica Sand
Supply & Demand..... 128
- 14 Other Western Europe: Silica Sand
Demand by Market 130

ASIA/PACIFIC

- 1 Asia/Pacific: Silica Sand
Supply & Demand..... 134
- Cht Asia/Pacific: Silica Sand
Demand by Country, 2011..... 135
- 2 Asia Pacific: Silica Sand
Demand by Market 136
- Cht Asia/Pacific: Silica Sand
Demand by Market, 2011..... 137
- 3 China: Silica Sand Supply & Demand.... 141
- 4 China: Silica Sand Demand by Market... 144
- 5 Japan: Silica Sand Supply & Demand 147
- 6 Japan: Silica Sand Demand by Market ... 148
- 7 India: Silica Sand Supply & Demand 151
- 8 India: Silica Sand Demand by Market.... 153
- 9 South Korea: Silica Sand
Supply & Demand..... 156
- 10 South Korea: Silica Sand
Demand by Market 157
- 11 Australia: Silica Sand Supply & Demand 160
- 12 Australia: Silica Sand Demand by Market 162
- 13 Other Asia/Pacific: Silica Sand
Supply & Demand..... 165
- 14 Other Asia/Pacific: Silica Sand
Demand by Market 167

OTHER REGIONS

- 1 Central & South America: Silica
Sand Supply & Demand 170
- 2 Central & South America: Silica
Sand Demand by Market 172
- Cht Central & South America: Silica
Sand Demand by Market, 2011 173
- 3 Brazil: Silica Sand Supply & Demand.... 176
- 4 Brazil: Silica Sand Demand by Market ... 178
- 5 Other Central & South America:
Silica Sand Supply & Demand..... 181
- 6 Other Central & South America:
Silica Sand Demand by Market..... 182
- 7 Eastern Europe: Silica Sand
Supply & Demand..... 185
- Cht Eastern Europe: Silica Sand
Demand by Country, 2011..... 186
- 8 Eastern Europe: Silica Sand
Demand by Market 187
- Cht Eastern Europe: Silica Sand
Demand by Market, 2011..... 188
- 9 Russia: Silica Sand Supply & Demand.... 191
- 10 Russia: Silica Sand Demand by Market... 193
- 11 Poland: Silica Sand Supply & Demand .. 196
- 12 Poland: Silica Sand Demand by Market.. 197
- 13 Other Eastern Europe: Silica
Sand Supply & Demand 200
- 14 Other Eastern Europe: Silica
Sand Demand by Market 202
- 15 Africa/Mideast: Silica Sand
Supply & Demand..... 205
- Cht Africa/Mideast: Silica Sand
Demand by Country, 2011..... 206
- 16 Africa/Mideast: Silica Sand
Demand by Market 207
- Cht Africa/Mideast: Silica Sand
Demand by Market, 2011..... 208
- 17 Turkey: Silica Sand Supply & Demand.... 211
- 18 Turkey: Silica Sand Demand by Market .. 212
- 19 South Africa: Silica Sand
Supply & Demand..... 215
- 20 South Africa: Silica Sand
Demand by Market 216
- 21 Other Africa/Mideast: Silica
Sand Supply & Demand 219
- 22 Other Africa/Mideast: Silica
Sand Demand by Market..... 221

INDUSTRY STRUCTURE

- 1 World Silica Sand Sales
by Company, 2011..... 224
- Cht World Silica Sand Market Share, 2011 225

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Outside of Asia, the large US market will lead gains based on its current dominance in hydraulic fracturing activity as well as a rebound in construction and motor vehicle production.

World demand to rise 4.8% annually through 2016

Global demand for industrial silica sand is projected to grow 4.8 percent annually to 280 million metric tons in 2016, with a value of \$9.2 billion. Glass production and foundries will continue to be the largest markets, although faster gains will be registered by the developing hydraulic fracturing sector. The Asia/Pacific region will account for the largest share of additional silica sand demand, driven by a healthy outlook for construction and foundry output, particularly in China and India. Outside of Asia, the best prospects are expected in the large US market, which is benefiting from its current dominance of hydraulic fracturing activity as well as a rebound in construction and motor vehicle production.

Glass market to provide largest net gain in demand

The glass market accounted for 36 percent of total 2011 industrial sand usage worldwide and will provide the largest net gain in sand demand through 2016. A number of factors influence demand in the large glass sector and this can result in considerable variations in the outlook for individual national markets. Container glass sand usage will register starkly different trends for developed and developing countries. In developed markets, especially those in Europe and the US, the increasing use of recycled materials in glass production and weak-to-declining container output



will continue to sharply reduce raw sand requirements. In contrast, markets in China and other developing countries that have limited recycling programs and strong container output growth will see above average gains.

Demand in the foundry sector, which runs a close second to glass in market share, will improve significantly based on a general improvement in the global economic outlook and strong growth in motor vehicle production. Fastest overall gains in foundry sand demand will be in China and South America. Demand growth in most other markets will also accelerate due to improved economic conditions.

Sand is also used as a proppant in hydraulic fracturing well stimulation projects, and has been essential to the development of shale plays in the US. Output from these plays is responsible for a resurgence in oil and gas production in the US market. While other countries are showing strong interest in frac sand, few are expected to register significant demand in the near term. The countries with the most promise are Canada and several nations in South America, notably Argentina. China also has significant shale resources but faces a number of obstacles to their development. While proppant demand in China will continue to climb, it is unclear what share of the market raw sand will be able to take.

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Sample Text, Table & Chart

ASIA/PACIFIC

China: Silica Sand Outlook

China's silica sand production is projected to reach 47.9 million metric tons in 2016, accounting for 56% of all global output in that year. Production of glass containers register healthy gains supported by the country's large beer and growing wine output. China's glass industry in general is a massive user of sand due to relatively low recycling rates. Suppliers also benefit from across-the-board gains in the foundry, building chemical, and other markets as output levels climb further.

There is a high level of interest regarding the future level of hydraulic fracturing activity in China with demand for proppants (of all types) in China projected to post robust increases through 2021. China produces no shale gas commercially right now despite its huge resources, and the nation is acquiring expertise from foreign oil and oil services firms to set the industry in motion. Leading energy companies including BP (UK), Chevron (US), Conoco-Phillips (US), and Shell (UK) are working in conjunction with a number of China's state-owned companies to develop the country's shale gas resources. Shell signed a production sharing contract with China National Petroleum in March 2012, the first such agreement in China. Furthermore, in August 2012 Shell announced it would spend at least \$1 billion annually exploring China's shale gas resources.

The Chinese government has set a target of producing 2 billion cubic feet a year of shale by 2015. However, it is not likely to

142

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**SAMPLE
TEXT**

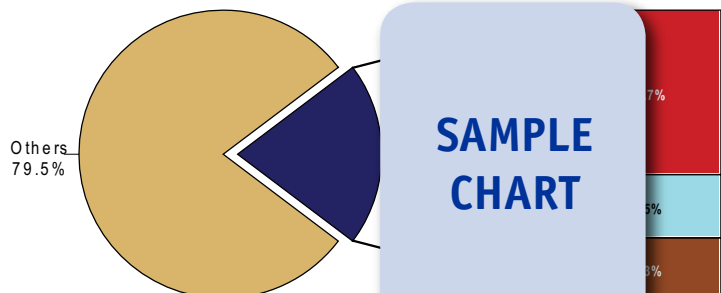
**TABLE VI-3
CHINA:
SILICA SAND SUPPLY & DEMAND**

Item	2001	2006	2011	2016	2021
Population (million persons)					138
GDP/capita					10,000
Gross Domestic Product (bil 2010\$)					10,000
Flat Glass Production (000 metric tons)					10,000
Crude Steel Production (mil metric tons)					10,000
Oil & Gas Wells Drilled					10,000
kg silica sand/capita					7
kg silica sand/000\$ GDP					5
Silica Sand Demand (mil metric tons)					10,000
net exports					10,000
Silica Sand Production (mil metric tons)					10,000
% China					4
A/P Silica Sand Prdn (mil metric tons)					10,000

**SAMPLE
TABLE**

CHART VIII-1

**WORLD SILICA SAND MARKET SHARE
(\$6.0 billion, 2011)**

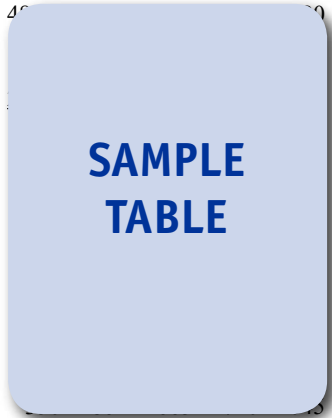


**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE VI-4
CHINA: SILICA SAND DEMAND BY MARKET
 (million metric tons)

Item	2001	2006	2011	2016	2021
Asia/Pacific Silica Sand Demand	40	45	50	55	60
% China					
Silica Sand Demand					
Glass:					
Container Glass					
Flat & Other Glass					
Foundries					
Hydraulic Fracturing					
Building Products					
Chemicals					
Other					
\$/metric ton					
Silica Sand Demand (mil \$)					



COMPANY PROFILES

EUROQUARZ GmbH
 Kirchhellener Allee 53
 Dorsten 46282
 Germany
 49-2362-2005
 http://www.eu

SAMPLE PROFILE

Annual Sales:
 Employment:

Key Products: standard, colored silica sand, silica

EUROQUARZ specializes in the extraction, treatment, and further processing of silica sand and silica gravel at several plants in Germany and the Netherlands. The privately held company also makes special ready-mixed mortars, tile adhesives, screeds, sealing mortars, and related products on a contract basis. EUROQUARZ serves customers in Germany, the Netherlands, and elsewhere.

The Company is active in the world silica sand industry through the manufacture and supply of standard silica sand, water filter silica sand, colored silica sand, silica flour, and related silica products. EUROQUARZ produces a variety of standard silica sands, including those sold under the SILGRAN and SILGRANO brand names. For example, SILGRAN dried silica sand is available in grain sizes ranging from .1 to .3 millimeters (mm) in size. This sand features a silicon dioxide content of 99.44 percent. End uses for SILGRAN silica include brake sands for rail bounded vehicles, artificial turf sand, golf course sand, bird sands, poultry forage amendment, and winter traction sand.

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“Production of industrial sand by facilities in China is expected to climb at a strong 6.0 percent annual pace through 2016 to 98.7 million metric tons, but not rapid enough to prevent the country’s trade deficit in silica sand from widening further. Domestic industry output will be fueled by healthy local sales conditions that will serve as catalysts for expansions in production. On the other hand, ...”
 --Section VI, pg. 143

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OTHER STUDIES

World Flat Glass

World demand for flat glass is forecast to rise 7.1 percent per year through 2016 to 9.2 billion square meters. The dominant Asia/Pacific region will continue to post the fastest gains. Fabricated flat glass demand will benefit from rapid growth in sales of energy efficient products such as solar control, insulation and low-E glass. This study analyzes the 6.6 billion square meter world flat glass industry, with forecasts for 2016 and 2021 by product, market, world region and for 21 countries. The study also evaluates company market share and profiles industry players.

#2970January 2013 \$6400

World Oilfield Chemicals

World demand for oilfield chemicals is expected to increase 8.9 percent annually to \$28 billion in 2016. The US will remain the largest market based on its many mature wells and rapid growth in horizontal drilling and hydraulic fracturing. Brazil will be the fastest growing market. Drilling fluids and completion and workover fluids will lead gains. This study analyzes the \$18 billion world oilfield chemical industry, with forecasts for 2016 and 2021 by product, world region and for 44 countries. The study also evaluates company market share and profiles industry participants.

#2973December 2012 \$6200

Well Stimulation Materials

US demand for well stimulation materials is forecast to rise 10.2 percent annually to nearly \$12 billion in 2016. Growth will be driven by continued advances in hydraulic fracturing technology designed to increase the productivity of both new and existing wells. Proppants, gases, and base fluid materials will be among the fastest growing products. This study analyzes the \$7.4 billion US well stimulation material industry, with forecasts for 2016 and 2021 by product and regional market. The study also evaluates company market shares and profiles industry players.

#2867March 2012..... \$5100

World Salt

Global demand for salt will rise 2.9 percent annually through 2015 to 327 million metric tons. Growth in chemical production, especially in China, will fuel most new demand. Demand will also benefit from shale gas drilling in North America, which will boost chloralkali output in the US and Canada. This study analyzes the 284 million metric ton world salt industry, with forecasts for 2015 and 2020 by market, production method, world region and for 20 countries. The study also evaluates company market share and profiles industry competitors.

#2857 February 2012 \$5900

Oilfield Chemicals

US oilfield chemical demand will rise 8.3 percent yearly through 2015, driven by the recovery of oil prices and the development of shale gas resources. Stimulation and cementing chemicals will be the fastest growing products, followed by drilling fluids. Natural gums, polymers, acids and surfactants will be among the best prospects in raw materials. This study analyzes the \$9.1 billion US oilfield chemical industry, with forecasts for 2015 and 2020 by product and raw material. The study also evaluates company market share and profiles industry players.

#2821 November 2011 \$4900

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