



[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](#)

[Order Form & Corporate Use License 7](#)

[About Freedonia, Custom Research, Related Studies, 8](#)

World Refractories

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

Study #2985 | March 2013 | \$6100 | 448 pages

www.freedoniagroup.com



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

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
World Macroeconomic Overview	4
Recent Historical Trends	5
World Economic Outlook	7
World Fixed Investment Trends	11
World Manufacturing Outlook	13
World Crude Steel Outlook	15
World Glass Outlook	17
Container Glass	17
Flat Glass	19
World Cement Outlook	21
Pricing Trends	22
Technology	26
Basic Refractory Properties	28
Refractory Shapes & Forms	31
Refractory Materials	32
Other Technological Developments	33

OVERVIEW

General	35
Regional Overview	36
Demand	36
Production	42
International Trade	44
Demand by Market	46
Iron & Steel	48
Steelmaking Technology	49
Steel Refractory Manufacturers/Products	52
Nonferrous Metals	53
Nonmetallic Minerals	56
Other	59
Demand by Form	61
Bricks & Shapes	62
Monolithics & Other	64
Demand by Material	66
Clay	67
Nonclay	69

NORTH AMERICA

General	72
Refractory Supply & Demand	73
Refractory Outlook & Suppliers	76
United States	78
Canada	83
Mexico	88

WESTERN EUROPE

General	94
Refractory Supply & Demand	95
Refractory Outlook & Suppliers	98
Germany	100
Italy	106
France	110
Spain	115
United Kingdom	120

Other Western Europe	126
Belgium	132
Austria	133
All Other	134

ASIA/PACIFIC

General	136
Refractory Supply & Demand	137
Refractory Outlook & Suppliers	140
China	142
India	149
Japan	154
South Korea	161
Taiwan	165
Australia	170
Other Asia/Pacific	175

OTHER REGIONS

Central & South America	181
Refractory Supply & Demand	182
Refractory Outlook & Suppliers	184
Brazil	186
Other Central & South America	191
Eastern Europe	197
Refractory Supply & Demand	199
Refractory Outlook & Suppliers	201
Russia	203
Ukraine	209
Poland	213
Other Eastern Europe	218
Africa/Mideast	224
Refractory Supply & Demand	225
Refractory Outlook & Suppliers	227
Turkey	229
Iran	234
South Africa	240
Other Africa/Mideast	244

INDUSTRY STRUCTURE

General	250
Market Share	253
Leading Refractory Producers	253
Leading Raw Material Suppliers	259
Product Development & Manufacturing	260
Marketing & Distribution	263
Cooperative Agreements	265
Financial Issues & Requirements	270
Mergers, Acquisitions, & Industry Restructuring	271

COMPANY PROFILES

Alcoa Incorporated	275
Allied Mineral Products	276
Almatis GmbH	279
Alteo Holding	282
AluChem Incorporated	283
ANH Refractories	285
Bosai Minerals	290
BURTON GmbH	292

Calucem GmbH	294
Carborundum Universal	296
China GengSheng Minerals	299
China National Bluestar	301
Chosun Refractories	304
Clayburn Industrial	306
CoorsTek Incorporated	309
Corning Incorporated	310
DSF Refractories & Minerals	312
Dyson Group	314
ESK-SiC GmbH	315
Haicheng Houying	316
Imerys SA	317
Jiachen Group	327
Krosaki Harima	328
Kümas Manyezit Sanayi	332
Kyanite Mining	333
Lhoist SA	335
Liaoning Jinding Magnesite	336
Magnesita Refratários	338
Materis Holding Luxembourg	341
Minerals Technologies	344
Morgan Crucible	347
OCL India	355
Orkla ASA	356
Puyang Refractories	357
Qinghua Refractories	358
Rath AG	360
Refratechnik Holding	364
Resco Products	367
RHI AG	369
Rio Tinto Group	374
Saint-Gobain	375
SANAC SpA	380
Shandong Luyang	382
Shandong Refractories	384
Shinagawa Refractories	386
Sinosteel Refractory	388
TYK Corporation	390
Unifrax I LLC	392
United Company RUSAL	396
Vesuvius plc	397
Xiyang Group	404
Other Companies Mentioned in Study	405

List of Tables/Charts

EXECUTIVE SUMMARY

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

MARKET ENVIRONMENT

1 World Gross Domestic Product by Region ..	11
2 World Gross Fixed Investment by Region ..	13
3 World Manufacturing Value Added by Region	15
4 World Crude Steel Production by Region ..	17

(continued on following page)

List of Tables/Charts

(continued from previous page)

- 5 World Container Glass Demand by Region .19
- 6 World Flat Glass Production by Region 20
- 7 World Cement Production by Region22
- 8 World Refractory Prices25
- Cht World Refractory Prices, 2001-202125
- Cht Melting Points of Industrial Minerals & Refractories 29

OVERVIEW

- 1 World Refractory Volume Demand by Region38
- Cht World Refractory Demand by Region, 201139
- Cht Change in Refractory Demand Between 2011 & 2016 by Region39
- 2 World Refractory Value Demand by Region40
- Cht World Refractory Demand in Metric Tons: Projected 2011-2016 Annual Rate of Growth.....41
- 3 World Refractory Shipments by Region.....43
- Cht World Refractory Shipments by Region, 201144
- 4 World Refractory Net Exports by Region ...46
- 5 World Refractory Demand by Market47
- Cht World Refractory Demand by Market, 201147
- 6 World Iron & Steel Refractory Demand by Region49
- 7 World Nonferrous Metals Refractory Demand by Region56
- 8 World Nonmetallic Minerals Refractory Demand by Region59
- 9 World Other Markets Refractory Demand by Region61
- 10 World Refractory Demand by Form.....62
- 11 World Brick & Shape Refractory Demand by Region64
- 12 World Monolithics & Other Refractory Demand by Region66
- 13 World Refractory Demand by Material.....67
- 14 World Clay Refractory Demand69
- 15 World Nonclay Refractory Demand71

NORTH AMERICA

- 1 North America: Refractory Supply & Demand.....75
- Cht North America: Refractory Demand by Country, 201176
- 2 North America: Refractory Demand by Form, Material, & Market.....78
- 3 United States: Refractory Supply & Demand.....81
- 4 United States: Refractory Demand by Form, Material, & Market.....83
- 5 Canada: Refractory Supply & Demand.....86
- 6 Canada: Refractory Demand by Form, Material, & Market.....88
- 7 Mexico: Refractory Supply & Demand91
- 8 Mexico: Refractory Demand by Form, Material, & Market.....93

WESTERN EUROPE

- 1 Western Europe: Refractory Supply & Demand.....97
- Cht Western Europe: Refractory Demand by Country, 201198
- 2 Western Europe: Refractory Demand by Form, Material, & Market..... 100
- 3 Germany: Refractory Supply & Demand.. 103
- 4 Germany: Refractory Demand by Form, Material, & Market..... 105
- 5 Italy: Refractory Supply & Demand..... 108
- 6 Italy: Refractory Demand by Form, Material, & Market..... 110
- 7 France: Refractory Supply & Demand 113
- 8 France: Refractory Demand by Form, Material, & Market..... 115
- 9 Spain: Refractory Supply & Demand..... 118
- 10 Spain: Refractory Demand by Form, Material, & Market..... 120
- 11 United Kingdom: Refractory Supply & Demand..... 123
- 12 United Kingdom: Refractory Demand by Form, Material, & Market..... 125
- 13 Other Western Europe: Refractory Supply & Demand..... 128
- 14 Other Western Europe: Refractory Demand by Form, Material, & Market.. 131
- 15 Other Western Europe: Refractory Supply & Demand by Country..... 132

ASIA/PACIFIC

- 1 Asia/Pacific: Refractory Supply & Demand..... 139
- Cht Asia/Pacific: Refractory Demand by Country, 2011 140
- 2 Asia/Pacific: Refractory Demand by Form, Material, & Market..... 142
- 3 China: Refractory Supply & Demand..... 146
- 4 China: Refractory Demand by Form, Material, & Market..... 149
- 5 India: Refractory Supply & Demand 152
- 6 India: Refractory Demand by Form, Material, & Market..... 154
- 7 Japan: Refractory Supply & Demand 158
- 8 Japan: Refractory Demand by Form, Material, & Market..... 160
- 9 South Korea: Refractory Supply & Demand..... 163
- 10 South Korea: Refractory Demand by Form, Material, & Market..... 165
- 11 Taiwan: Refractory Supply & Demand.... 168
- 12 Taiwan: Refractory Demand by Form, Material, & Market..... 170
- 13 Australia: Refractory Supply & Demand .. 173
- 14 Australia: Refractory Demand by Form, Material, & Market..... 175
- 15 Other Asia/Pacific: Refractory Supply & Demand..... 178
- 16 Other Asia/Pacific: Refractory Demand by Form, Material, & Market..... 180

OTHER REGIONS

- 1 Central & South America: Refractory Supply & Demand..... 183
- 2 Central & South America: Refractory Demand by Form, Material, & Market.. 185
- 3 Brazil: Refractory Supply & Demand 188
- 4 Brazil: Refractory Demand by Form, Material, & Market..... 191
- 5 Other Central & South America: Refractory Supply & Demand..... 194
- 6 Other Central & South America: Refractory Demand by Form, Material, & Market.. 197
- 7 Eastern Europe: Refractory Supply & Demand..... 200
- 8 Eastern Europe: Refractory Demand by Form, Material, & Market..... 203
- Cht Eastern Europe: Refractory Demand by Country, 2011..... 201
- 9 Russia: Refractory Supply & Demand..... 206
- 10 Russia: Refractory Demand by Form, Material, & Market..... 208
- 11 Ukraine: Refractory Supply & Demand.... 211
- 12 Ukraine: Refractory Demand by Form, Material, & Market..... 213
- 13 Poland: Refractory Supply & Demand 216
- 14 Poland: Refractory Demand by Form, Material, & Market..... 218
- 15 Other Eastern Europe: Refractory Supply & Demand..... 221
- 16 Other Eastern Europe: Refractory Demand by Form, Material, & Market.. 223
- 17 Africa/Mideast: Refractory Supply & Demand..... 226
- 18 Africa/Mideast: Refractory Demand by Form, Material, & Market..... 229
- 19 Turkey: Refractory Supply & Demand 232
- 20 Turkey: Refractory Demand by Form, Material, & Market..... 234
- 21 Iran: Refractory Supply & Demand..... 237
- 22 Iran: Refractory Demand by Form, Material, & Market..... 239
- 23 South Africa: Refractory Supply & Demand..... 242
- 24 South Africa: Refractory Demand by Form, Material, & Market..... 244
- 25 Other Africa/Mideast: Refractory Supply & Demand..... 247
- Cht Africa/Mideast: Refractory Demand by Country, 2011..... 227
- 26 Other Africa/Mideast: Refractory Demand by Form, Material, & Market..... 249

INDUSTRY STRUCTURE

- 1 Finished Refractory Sales by Company, 2011..... 252
- Cht World Refractory Market Share, 2011 253
- 2 Selected Cooperative Agreements..... 268
- 3 Selected Acquisitions & Divestitures..... 273

Demand will be stimulated by an acceleration in construction and other fixed investment activity, leading to stepped up output of steel, aluminum, cement, and other refractory-made goods.

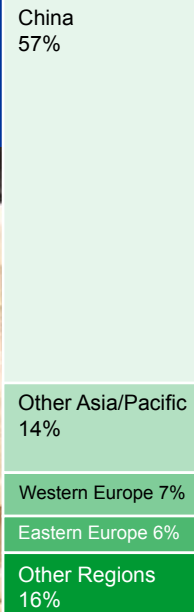
World demand to rise 3.4% annually through 2016

Global refractory demand is projected to expand at a 3.4 percent annual rate through 2016 to 46.3 million metric tons, an improvement over 2006-2011 market performance. Product sales will climb 5.3 percent annually in value terms to \$46.5 billion in 2016, not as strong as gains registered in recent years because of a moderation in raw material costs and refractory prices. Increases in refractory demand will be stimulated by an acceleration in construction and other fixed investment activity as economic conditions continue to improve, leading to stepped up output of steel, aluminum, cement, and other refractory-made goods. A pickup in personal consumption expenditures will also result in higher demand for everything from glass containers to motor vehicles, contributing to growth in refractory sales as industry production levels rise. Greater use of refractories in chemicals manufacturing, incinerators, and a variety of other small volume markets will also help bolster overall product sales.

Developing areas to see fastest growth in sales

Refractory sales will expand most quickly in developing areas, reflecting an ongoing shift in metals and other heavy industry production to countries with low cost structures. The Asia/Pacific region, in particular, will post the largest tonnage increases, followed by the Africa/Mideast

World Refractory Demand, 2016 (46.3 million metric tons)



region, Central and South America, and Eastern Europe. China alone will account for more than seven-tenths of all refractory volume gains between 2011 and 2016, due both to additional growth in its huge steel, cement, and other heavy manufacturing industries and to the use of less sophisticated production methods in steelmaking and other important markets than those utilized in economically advanced nations, resulting in greater refractory use in per unit of output terms.

The volume of refractories consumed will also rise in the US, Western Europe, and Japan following an extended period of decline, as economic conditions strengthen in these areas and output of

ferrous metals and other refractory-using products rebounds. Output gains in these areas are more likely to result in higher refractory demand because the manufacturing techniques utilized are already so efficient that it will be much more difficult to reduce refractory consumption on a per unit output basis than in less developed countries. Due to their greater use of more costly, high quality products, the US, Western Europe, and Japan will account for a somewhat larger share of the world refractory market total in dollar terms (19 percent) in 2016 than they will in tonnage (14 percent).

Copyright 2013 The Freedonia Group, Inc.

[Click here to purchase online](#)

Sample Text, Table & Chart

ASIA/PACIFIC

China: Refractory Outlook & Suppliers

Sales of refractories in China are expected to increase annually through 2016 to moderate levels. The 2006-2011 period but will continue to industrialize and will stimulate growth in construction, cement, glass, and steel, much of which will be restrained by the rising price of raw materials. In view of the fact that refractory sales will grow at a rate of 10.0 billion. Price increases will not be as strong as those posted during 2011 period, when they were driven up by robust refractory demand and high world raw material costs.

**SAMPLE
TEXT**

The iron and steel market, which accounted for 62 percent of 2011 Chinese refractory sales total, will continue to drive growth in overall refractory demand, with sales to ferrous metal manufacturing forecast to expand faster than those to any other major market. However, steelmakers are becoming much more efficient in their use of refractories. While China will continue to use more refractories per ton of steel produced than almost any other country, the gap will narrow through 2016.

Suppliers of refractories used in the manufacture of aluminum, cement, copper, and glass will benefit from climbing production of these goods through 2016. However, as in ferrous metal manufacturing, producers of nonferrous metal and nonmetallic mineral products are becoming more efficient in their use of refractories, which will limit future sales increases. Manufacturers will achieve additional gains by utilizing higher quality production equipment, more advanced manufacturing methods, and better performing refractories, creating new sales opportunities for high end refractory suppliers.

146

Copyright 2013

TABLE VI-3

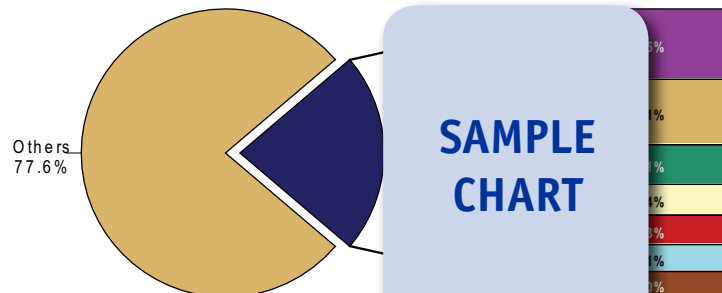
CHINA: REFRACTORY SUPPLY & DEMAND

Item	2001	2006	2011	2016	2021
Gross Domestic Product (bil 2010\$)					
% GFI					
Gross Fixed Investment (bil 2010\$)					
Steel Production (mil metric tons)					
m ton refractory/mil \$ GFI					
m ton refractory/000 m ton steel					
Refractory Demand (000 metric tons)					
\$/m ton					
Refractory Demand (mil \$)					
net exports					
Refractory Shipments (mil \$)					
% China					
Asia/Pacific Refractory Shipments (mil \$)					

**SAMPLE
TABLE**

CHART VIII-1

WORLD REFRACTORY MARKET SHARE (\$35.9 billion, 2011)



**SAMPLE
CHART**

Sample Profile, Table & Forecast

COMPANY PROFILES

Dyson Group plc

Totley Works
 Baslow Road
 Sheffield S17 2
 United Kingdom
 44-114-235-53
<http://www.dys>

Annual Revenue:
 Employment:

Key Products:

**SAMPLE
PROFILE**

Dyson Group is involved in the development and commercialization of high-performance materials used in demanding environments. The privately held company operates through two subsidiaries, Dyson Technical Ceramics Limited and Builders Centre Sheffield Limited, both of which are headquartered in the United Kingdom (UK).

The Company is involved in the world refractory industry through the Dyson Technical Ceramics subsidiary, which did business as Dyson Thermal Technologies prior to October 2012. Dyson Technical Ceramics manufactures zirconia based refractory ceramics, as well as tin oxide electrodes. Specific refractory items available from the company comprise atomizing nozzles, fire bricks, and zirconia crucibles. Atomizing nozzles are utilized in the powder metallurgy industry for the casting and atomization of ferrous and nonferrous molten metal. Among Dyson Technical Ceramics' atomizing nozzles are ZIRCATOM OZA yttria-stabilized zirconia types, ZIRCATOM MCA ceria- and magnesia-stabilized zirconia nozzles, and ZIRCATOM ZSA zircon nozzles with zirconia enhancements.

314

Copyright 2013 The Freedonia Group, Inc.

TABLE VI-4

CHINA: REFRACTORY DEMAND BY FORM, MATERIAL & MARKET (thousand metric tons)

Item	2001	2006	2011	2016	2021
Asia/Pacific Refractory Demand % China	1				
Refractory Demand					
By Form:					
Bricks & Shapes					
Monolithics & Other					
By Material:					
Clay					
Nonclay					
By Market:					
Iron & Steel					
Nonferrous Metals					
Nonmetallic Minerals					
Other					

**SAMPLE
TABLE**

"Shipments of refractories from producers in China are projected to climb 6.7 percent per annum to \$27.3 billion in 2016, about the same as domestic demand. Since many refractory buyers rely on local sources of supply, many of the same factors fueling growth in Chinese product demand will help boost industry output. Recovering export markets -- especially in Japan, the US, and Western Europe -- will lead to an increase in overseas industry sales and a widening trade surplus, further bolstering domestic refractory production."

--Section VI, pg. 147

ONLINE: www.freedoniagroup.com

MAIL: Print out and complete the order form and send to The Freedonia Group (see address at the bottom of this form)

PHONE: Call toll free, 800.927.5900 (US) or + 1 440.684.9600

FAX: + 1 440.646.0484 (US)

EMAIL: info@freedoniagroup.com

Free Handling & Shipping

There is NO charge for handling or UPS shipping in the US. Expect delivery in 3 to 5 business days. Outside the US, Freedonia provides free airmail service. Express delivery is available at cost.

Orders Outside of the US

Checks must be made payable in US funds, drawn against a US bank and mailed directly to The Freedonia Group. For wire transfers please contact our customer service department at info@freedoniagroup.com. Credit cards accepted.

Credit Card Orders

For convenience, Freedonia accepts American Express, MasterCard or Visa. Credit card purchases must include account number, expiration date and authorized signature.

Save 15%

If you order three (3) different titles at the same time, you can receive a 15% discount. If your order is accompanied by a check or wire transfer, you may take a 5% cash discount (discounts do not apply to Corporate Use Licenses).

Corporate Use License

Now every decision maker in your organization can act on the key intelligence found in all Freedonia studies. For an additional \$2600, companies receive unlimited use of an electronic version (PDF) of the study. Place it on your intranet, e-mail it to coworkers around the world, or print it as many times as you like,

[Click here to learn more about the Corporate Use License](#)

ORDER FORM

F-WEB.2985

World Refractories \$6100

Corporate Use License (add to study price) * + \$2600

Additional Print Copies @ \$600 each *
Total (including selected option) \$_____

Enclosed is my check (5% discount) drawn on a US bank and payable to The Freedonia Group, Inc., in US funds (Ohio residents add 7.75% sales tax)

Bill my company American Express MasterCard Visa

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Credit Card #

--	--	--	--	--	--	--	--	--	--

Expiration Date

Signature _____

Name _____

Title _____

Company _____

Division _____

Street _____
(No PO Box please)

City/State/Zip _____

Country _____

Phone _____ Fax _____

Email _____

* Please check appropriate option and sign below to order an electronic version of the study.

Corporate Use License Agreement

The above captioned study may be stored on the company's intranet or shared directory, available to company employees. Copies of the study may be made, but the undersigned represents that distribution of the study will be limited to employees of the company.

Signature _____

Individual Use License Agreement

The undersigned hereby represents that the above captioned study will be used by only ___ individual(s) who are employees of the company and that the study will not be loaded on a network for multiple users. In the event that usage of the study changes, the Company will promptly notify Freedonia of such change and will pay to Freedonia the appropriate fee based on Freedonia's standard fee schedule then in effect. Note: Entire company corporate use license, add \$2600; one additional user, add \$600; two additional users, add \$1200; three additional users, add \$1800.

Signature _____

OTHER STUDIES

Machine Tools in China

Demand for machine tools in China is forecast to increase 9.2 percent per annum to ¥600 billion in 2017. Both metal cutting and forming machine tools and machine tool accessories will grow at a similarly strong pace. Transportation equipment and electrical/electronic equipment manufacturing will be the fastest growing markets. This study analyzes the ¥386 billion machine tool industry in China, with forecasts for 2017 and 2022 by product, market and region. The study also evaluates company market share and profiles industry participants.

#3090December 2013 \$5300

Advanced Ceramics

Demand for advanced ceramics in the US is forecast to increase 5.1 percent annually to \$13.6 billion in 2017. Medical products will be the fastest growing market, driven by applications such as dental implants and prosthetic components. Ceramic matrix composites will be the fastest growing class of products. This study analyzes the \$10.6 billion US advanced ceramics industry, with forecasts for 2017 and 2022 by material, class, process and market. The study also evaluates company market share and profiles industry players.

#3091 November 2013 \$5200

World Cement

World sales for cement are forecast to expand more than five percent annually through 2017 to over 4.7 billion metric tons. Demand will rebound sharply in North America and Western Europe, while growth in China will decelerate yet still achieve impressive gains. Blended cement will account for over three-fourths of all new demand. This study analyzes the 3.7 billion metric ton world cement industry, with forecasts for 2017 and 2022 by type, market, world region, and for 45 countries. The study also evaluates company market share and profiles industry participants.

#3096October 2013 \$6400

Bearings

Bearing demand in the US will increase 4.4 percent per year to \$12.9 billion in 2017, a notable improvement from the 2007-2012 period. Roller bearing demand is expected to continue to outpace other product types, supported by motor vehicle, machinery and wind turbine markets. Ball bearing consumption will also post healthy gains, supported by increasing manufacturing output. This study analyzes the \$10.4 billion US bearing industry, with forecasts for 2017 and 2022 by product and market. The study also evaluates company market share and profiles industry players.

#3069 August 2013 \$5100

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

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

[Click here to learn more about Freedonia](#)

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

[Click here to learn more about Custom Research](#)



[Click here for complete title list](#)



[Click here to visit freedoniagroup.com](http://www.freedoniagroup.com)