World Industrial Silica Sand

Industry Study with Forecasts for 2018 & 2023

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INDUSTRY STRUCTURE

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Gains will be driven by growth in the glass, foundry, and building products sectors, as well as in the hydraulic fracturing market as horizontal drilling for shale oil and gas resources expands.

World demand to rise 5.5% annually through 2018

Global demand for industrial silica sand is forecast to advance 5.5 percent per year to 291 million metric tons in 2018, with a value of $12.5 billion. Accelerations in construction spending and manufacturing output worldwide are expected to drive growth in important silica sand-consuming industries, including the glass, foundry, and building products sectors. Particularly rapid gains are projected for the hydraulic fracturing market as horizontal drilling for shale oil and gas resources expands, largely in North America. Nevertheless, faster gains in the overall market will be constrained by ongoing efforts to incorporate higher volumes of recycled glass cullet in the manufacture of glass containers. In addition, increased reclamation of foundry sand is expected to limit demand for industrial sand used in the production of metal casting molds.

Asia/Pacific region to remain largest market

The Asia/Pacific region will remain the largest regional consumer of industrial sand through 2018, supported by the dominant Chinese market. China’s massive glass industry, the largest worldwide, will continue to bolster industrial sand consumption for the production of windows, electronic display screens, photovoltaic panels, and other flat glass products. The country’s container glass industry will drive further silica sand sales, supported by rising production of glass bottles, particularly in the alcoholic beverage sector. In India, foundry activity will advance at a healthy pace, spurring the production of sand molds to manufacture automotive, machine tool, wind turbine, and other types of metal castings. Indonesia will also register strong growth in silica sand sales through 2018, supported by rapid advances in the output of glass products and metal castings, combined with increased hydraulic fracturing activity.

North America to be fastest growing market

Demand for silica sand in North America is forecast to rise at a faster annual pace than any other regional market. The US and Canada will lead regional growth, driven by expansion in the countries’ respective hydraulic fracturing segments. Strength in US oilfield activity will boost demand for sand proppants, as will increases in the number of fracturing stages per well. Consumption of silica sand in Western Europe is projected to see more modest annual gains through 2018, although such growth will mark a rebound from the declines registered between 2008 and 2013. Recoveries in building construction and manufacturing activity, including a turnaround in flat glass output, will stimulate renewed demand for industrial sand in the region.

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Asia/Pacific

Australia: Silica Sand Supply & Demand

Australia’s market for industrial silica sand totaled 1.5 million metric tons in 2013, up by 17 percent from the prior year. The country is the third largest consumer of industrial silica sand in the world, after China and the US. The low output of glass and foundry products in Australia is compensated by a growing demand for automotive replacement glass, specialty building materials, and other products manufactured with industrial silica. The glass market comprises more than half of total demand in Australia, accounting for 54 percent in 2013, followed by the building products segment with one-fifth of overall consumption. Australia’s foundry market for industrial silica sand, which captured 12 percent of total demand in 2013, has declined in recent years due to strong declines in domestic motor vehicle output.

In 2013, Australia ranked as the sixth leading producer of industrial sand worldwide with an output of 6.1 million metric tons. The country was also the second largest net exporter worldwide (behind the US) and registered a trade surplus equivalent to over three-fourths of production in 2013. Australia is a major supplier of silica sand to customers in the Asia/Pacific region, particularly Japan, South Korea, Taiwan, and the Philippines. Glass- and foundry-grade industrial sand is produced at a number of locations in the country, including the Cape Flattery Mine in North Queensland. Additional sources include Queensland’s North Stradbroke Island and the more recently developed Mourilyan deposit located near Cairns. In New South Wales, silica sand is sourced from coastal dune deposits, including those located near Stockton Bight. Western Australia also produces silica sand, sourced from coastal dunes and deposits, including those located near Mount Compass and Whyalla. Through 2018, Australia is expected to see its trade surplus widen as production expands less than one percent per year to 6.3 million metric tons, supported by growing demand in important regional export markets.
EUROQUARZ GmbH
Kirchhellener Allee 53
Dorsten  46282
Germany
49-2362-2005-0
http://www.euroquarz.com
Annual Sales:  $75 million (estimated)
Employment:  230 (estimated)
Key Products:  standard silica sand, water filter silica sand, colored silica sand, silica flour, and related products

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 a subsidiary of L. Posseh & Company mbH (Germany), a privately held holding company.

The Company competes in the global silica sand industry via the production and supply of standard silica sand, colored silica sand, water filter silica sand, silica flour, and related silica products. Among EUROQUARZ’s standard silica sands are those marketed under the SILGRAN and SILGRANO brand names. For example, SILGRAN dried silica sand is available in grain sizes as small as 0.1 to millimeters (nm) and features a silicon dioxide content of 99.44 percent. SILGRAN sand can be used as artificial turf sand, golf course sand, brake sands for rail bounded vehicles, bird sands, poultry forage amendment, and winter traction sand, among other applications.

TABLE VI-14
AUSTRALIA: SILICA SAND DEMAND BY MARKET
(million metric tons)

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World Industrial Silica Sand is a Freedonia industry study priced at $6200. It presents historical data (2003, 2008, 2013) plus forecasts (2018 and 2023) for supply and demand, plus demand by market, in 6 regions and 19 countries. The study also details market environment factors, examines industry structure, evaluates company market share and profiles 35 competitors in the global industry.
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