World demand for kaolin, also known as China clay, will generally be driven by the expansion of manufacturing activity in developing countries. Advances will be constrained by a contraction in the paper markets of North America and Western Europe, as the increasing digitization of media erodes demand for kaolin-intensive coated paper products.

Hydraulic fracturing drives kaolin in ceramics production

Ceramics production, which represents the second largest market for kaolin, grew at an above-average rate between 2010 and 2015. Gains in this market were supported by a boom in demand for ceramic proppants used in hydraulic fracturing applications, particularly in the US. A fall in global oil prices beginning in 2015 cast petroleum industries into a state of uncertainty, and fast gains for ceramic proppants are not expected to be repeated through 2020.

Digitization continues to damage the paper industry

The paper market will continue to represent the largest outlet for kaolin. However, the importance of the paper market has declined significantly since 2005, when it represented 46 percent of world kaolin consumption. Global paper and paperboard production grew between 2005 and 2015, but output of coated paper products, which consume kaolin more intensively than do uncoated products, declined. As a result, demand for kaolin in the paper market fell over this period. The performance of kaolin in paper filling applications has been eroded by competition from alternative materials, particularly calcium carbonates. Slow growth in coated paper production will limit advances for kaolin through 2020.

India, Malaysia & China show most rapid growth

Through 2020, growth in kaolin demand in the Asia/Pacific region is forecast to outpace the global average, with the fastest gains occurring in India, Malaysia, and China. The region accounted for the largest share of kaolin demand in 2015, thanks to the presence of China and several other major kaolin consumers, including Japan, India, and South Korea. However, regional growth will be restrained by a contraction in Japan, where kaolin consumption in the paper market is forecast to fall.

Study coverage

This study analyzes the global kaolin market. It presents historical data (2005, 2010 and 2015) plus forecasts (2020 and 2025) for supply and demand, as well as demand by market (paper, ceramics, paint, refractories, rubber, other) in 6 regions and 21 major countries. In addition, the study considers key market environment factors, assesses the industry structure and evaluates company market share.
World Kaolin

CONTENTS SUMMARY

Executive Summary

Market Environment

Overview
Demand by Region
Demand by Market
Paper
Ceramics
Other Markets
Production by Region
International Trade

North America
North America: Economic Overview
North America: Supply & Demand
North America: Demand by Market
United States
Canada
Mexico

Western Europe
Western Europe: Economic Overview
Western Europe: Supply & Demand
Western Europe: Demand by Market
Germany
Italy
Finland
Spain
France
Sweden
United Kingdom
Other Western Europe

Asia/Pacific
Asia/Pacific: Economic Overview
Asia/Pacific: Supply & Demand
Asia/Pacific: Demand by Market
China
Japan
South Korea
India
Taiwan
Malaysia
Thailand
Other Asia/Pacific

Other Regions
Central & South America
Brazil
Other Central & South America
Eastern Europe
Russia
Czech Republic
Other Eastern Europe
Africa/Mideast
Turkey
Other Africa/Mideast

Industry Structure
Industry Composition & Market Share
Mining & Manufacturing
Kaolin Reserves
Distribution
Marketing
Mergers, Acquisitions, & Industry Restructuring
Cooperative Agreements

TABLES & CHARTS

Executive Summary
1 Summary Table

Overview
1 World Kaolin Demand by Region
Cht World Kaolin Demand by Region, 2015
2 World Kaolin Demand by Market

Industry Structure
1 World Kaolin Sales by Company, 2015
Cht World Kaolin Market Share, 2015
2 Selected Acquisitions & Divestitures
3 Selected Cooperative Agreements

Tables for each region and country:
Kaolin Supply & Demand
Kaolin Demand by Market
Chart for each region:
Kaolin Demand by Country, 2015
Chart for each country:
Kaolin Demand, 2005-2015
... plus macroeconomic indicators
China: Demand by Market

Demand for kaolin in China is forecast to grow 4.3 percent per annum through 2020 to 5.9 million metric tons, valued at $776 million. Growth in kaolin consumption in the country will continue to outpace the global average. The ceramics market holds the largest share of kaolin demand in the country, reflecting high levels of manufacturing of products such as sanitaryware and ceramic tableware. Rising manufacturing levels will contribute to increased demand for kaolin in ceramics through 2020. However, a slowdown in building construction spending will constrain growth for kaolin in products related to construction, such as ceramic building tile.

Paper is the second largest market for kaolin in China, reflecting massive levels of production of paper and paperboard. However, paper products represent a relatively small share of output, and as a result the intensity of kaolin use in paper production is below the global average. Strong growth in paper production is expected to support gains in demand for kaolin through 2020. Rising standards of living will contribute to growth for higher-value paper products that use kaolin intensively, but this will be offset somewhat by increasing digitization of media.

The refractories market is expected to post below average growth through 2020, as gains in demand for clay refractories will be limited by a relatively modest outlook for the primary metals industry. Demand for kaolin in the paint and rubber markets is forecast to advance at faster rates. A significant amount of kaolin consumption in China also occurs in a variety of smaller markets, such as fiberglass and cement. Strong growth in manufacturing activity will support gains for kaolin in other markets through 2020.

TABLE VII-3

<table>
<thead>
<tr>
<th>Item</th>
<th>2005</th>
<th>2010</th>
<th>2015</th>
<th>2020</th>
<th>2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population (mil persons)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$ GDP/capita</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GDP (bil 2014$)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manufacturing Value Added (bil 2014$)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paper/Paperboard Prdn (mil tons)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>m tons kaolin/mil $ GDP</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>m tons kaolin/mil $ MVA</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kaolin Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>net exports</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kaolin Shipments</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: The Freedonia Group

TABLE VI-4

<table>
<thead>
<tr>
<th>Item</th>
<th>2005</th>
<th>2010</th>
<th>2015</th>
<th>2020</th>
<th>2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia/Pacific Kaolin Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% China</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kaolin Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paper</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ceramics</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paint</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Refractories</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rubber</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$/metric ton</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kaolin Demand (mil $)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: The Freedonia Group

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

For complete details on any study visit www.freedoniagroup.com
Contact Freedonia
1.800.927.5900 (US & Canada)
+1 440.684.9600 (Int'l)
email: info@freedoniagroup.com
website: freedoniagroup.com

Related Studies

**World Paint & Coatings**
World demand for paint and coatings is projected to increase 3.7 percent per year to $4.7 million metric tons in 2020. The best growth opportunities will occur in India, where paint use will be spurred by rapidly expanding investment to build and update homes, businesses and industrial facilities. The study details the 45.5 million metric ton paint and coatings market, giving forecasts for 2020 and 2025 for supply and demand, plus demand by market and formulation, in 6 regions and 23 countries. The study also evaluates company market share and profiles global players.

#3418................June 2016.................$6200

**World Mining Equipment**
Global demand for mining equipment is forecast to expand 7.0 percent annually to nearly $105 billion in 2019. Minerals and metals mining will remain the fastest growing markets. China will remain the largest national market, while India will be the fastest growing. This study analyzes the $74.5 billion world mining equipment industry, with forecasts for 2019 and 2024 by market and product for six world regions and 20 major countries, with total demand provided for an additional 7 countries. The study also evaluates company market share and profiles industry players.

#3337.............November 2015..........$6600

**World Tungsten**
World demand for processed tungsten will rise 4.2 percent yearly to 146,400 metric tons in 2019. The Asia/Pacific region, led by China, will continue to dominate supply and consumption, while India will be the fastest growing market. Tungsten alloys will pace gains by product, while cemented carbides remain the largest segment. This study analyzes the 119,100 metric ton world tungsten industry, with forecasts for 2019 and 2024 by product for six world regions and 16 major countries. The study also evaluates company market share and profiles industry players.

#3306................July 2015.............$6200

**Refractories**
Demand for refractories in the US will rise 3.3 percent per year through 2019 to $3.1 billion. Volume increases will be much more sluggish, as improvements in refractory designs enable less material to be used per ton of output. Nonclay refractories will outpace clay refractories based on performance advantages that boost the use of nonclay types. This study analyzes the $2.8 billion US refractory industry, with forecasts for 2019 and 2024 by refractory form, material and market. The study also evaluates company market share and profiles industry competitors.

#3295................June 2015.............$5300

**Freedonia’s methods**
- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

**About The Freedonia Group**
The Freedonia Group 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 and other world markets. Industries analyzed by Freedonia include:

- Automotive & Transport
- Chemicals
- Construction & Building Products
- Consumer Goods
- Energy & Petroleum
- Industrial Components
- Healthcare & Life Sciences
- Machinery & Equipment
- Metals, Minerals & Glass
- Packaging
- Plastics & Other Polymers
- Security
- Services
- Textiles & Nonwovens
- Water Treatment

**The Freedonia Group is a division of MarketResearch.com**

**About MarketResearch.com**
With offices in London, New York City, and Washington D.C., MarketResearch.com is the leading provider of global market intelligence products and services. With research reports from more than 720 top consulting and advisory firms, MarketResearch.com offers instant online access to the world’s most extensive database of expert insights on industries, companies, products, and trends.