

# World Kaolin

## Industry Study with Forecasts for 2020 & 2025

Study #3462 | September 2016 | \$6200



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.

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Industry Study with historical data for 2005,  
2010 & 2015 plus forecasts for 2020 & 2025

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Demand for kaolin annum through 2020 to Growth in kaolin consu the global average. The kaolin demand in the cc products such as sanitar turing levels will contri through 2020. Howeve will constrain growth fc as ceramic building tile

Paper is the secon massive levels of production of paper and paperboard. However, paper products represent a relatively small share of output, and as result the intensity of kaolin use in paper production is below the average. Strong growth in paper production is expected to suppor gains in demand for kaolin through 2020. Rising standards of livi will contribute to growth for higher-value paper products that use intensively, but this will be offset somewhat by increasing digitiza 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.

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### 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

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#### BRAZIL: KAOLIN SUPPLY & DEMAND (thousand metric tons)

Item	2005	2010	2015	2020	2025
Population (mil persons)					
\$ GDP/capita					
GDP (bil 2014\$)					
Manufacturing Value Added (bil 2014\$)					
Paper/Paperboard Prdn (mil tons)					
m tons kaolin/mil \$ GDP					
m tons kaolin/mil \$ MVA					
Kaolin Demand					
net exports					
Kaolin Shipments					

Source: The Freedonia Group

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#### CHINA: KAOLIN DEMAND BY MARKET (thousand metric tons)

Item	2005	2010	2015	2020	2025
Asia/Pacific Kaolin Demand % China					
Kaolin Demand					
Paper					
Ceramics					
Paint					
Refractories					
Rubber					
Other					
\$/metric ton					
Kaolin Demand (mil \$)					

Source: The Freedonia Group

## Related Studies

### World Paint & Coatings

World demand for paint and coatings is projected to increase 3.7 percent per year to 54.7 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 \$2.6 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

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## 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

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