

# Ground and Precipitated Calcium Carbonate: Global industry markets & outlook

## ARE YOU FACING BIG DECISIONS INVOLVING GCC OR PCC?

Global demand and supply for both PCC & GCC is changing and competition is intensifying across the board. If you're involved with GCC or PCC in any way, you know that everything's important – both the small details and the big picture. A complete perspective is essential, whether you're preparing company strategy, bringing new products to market, buying, selling or investing.

## MAKE THE RIGHT CHOICE

Whatever your challenge, this report gives you deep insights to help you make well-informed recommendations or decisions. It's a detailed account of:

- World production and consumption
- Five year price forecasts
- End-use market applications
- Price trends
- International trade patterns
- The operations of the major producers

## IS THIS REPORT FOR YOU?

Our clients include anyone with an interest in the evolving GCC and PCC markets, anywhere in the world. Readers of past reports have come from a wide variety of relevant industries – from extraction to end-use, from mines to factories to banks, from existing players to new entrants. And they range from analysts and researchers to operational managers and chief executives.

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### WHAT READERS SAY

“When we review project or company opportunities, the most important area of review is the market place. We have always deferred to Roskill reports and their services for the prime benchmark reference point.”

Michael Kiernan,  
Consolidated Minerals Limited

“Roskill has been a key reference to our industry for a long time...the best reference about the market and industries.”

Bayram AnKarali  
Etimine SA, Turkey

“One of the few sources available for critical, detailed and reliable information on the industrial minerals markets.”

Emilio Lobato,  
Technical Marketing Manager,  
Magnesita Refrataria SA, Brazil

### GET ACCURATE ANSWERS FROM INDEPENDENT EXPERTS

- What are the main growth markets for GCC and PCC?
- Who are the main producers of GCC and PCC and where are their plants located?
- How much GCC and PCC is consumed in paper?
- What will world demand for GCC and PCC be in 2016?

### WHY READERS CHOOSE ROSKILL

**We're approachable.** Our sources include a large network of industry contacts: the key players talk to us because we're approachable and because they know us well.

**We're independent.** The information and insights in “Ground and Precipitated Calcium Carbonate: Global industry markets & outlook” are completely independent. We're privately-owned and not beholden to anyone. Our expert researchers make a thorough and objective analysis of all available data, from sources across the globe.

**We're expert.** You want facts from people who know what they're talking about. Roskill's experts have been analysing the manganese industry for over 35 years and this is our first combined report on these two commodities.

#### **Approachable. Independent. Expert.**

That's why no other report can match the accuracy, depth and expertise of “Ground and Precipitated: Global industry markets & outlook”.

### WHAT ELSE CAN WE DO FOR YOU?

We also offer expert bespoke consultancy to help you tackle specific complex challenges, such as feasibility studies, market assessments or due diligence reports.

If you'd like to discuss a project, please email [judith@roskill.co.uk](mailto:judith@roskill.co.uk) or call +44 20 8417 0087.

# Ground and Precipitated Calcium Carbonate: Global industry markets & outlook

## What's included?

Contents: 366 pages, 211 tables, 37 figures plus trade appendix

## Overview

World consumption of filler grade calcium carbonate was 74Mt in 2011, comprising 60Mt ground (GCC) and 14Mt precipitated (PCC) material. Paper and plastics are the largest markets for calcium carbonate, accounting for around 39% and 26% respectively of total consumption of GCC and PCC in 2011. Asia is both the largest regional market, accounting for almost half of global GCC and PCC consumption in 2011, and the fastest-growing market, primarily driven by expansion in the Chinese paper and plastics sectors. By 2011, China accounted for >20% of world GCC and PCC consumption.

The use of calcium carbonate by the paper industry has grown significantly in recent

years reflecting an overall increase in paper production-nearly 6%py in output from Asian countries.

Both GCC and PCC are widely-used as fillers in rigid PVC, which is produced in large amounts (>36Mt in 2010) and often has high mineral loadings. Growth in PVC demand in industrialised countries was adversely affected by the recession in the construction industry in the late 2000s. Chinese PVC production, however, has risen by 17%py over the last decade and by 2010, China accounted for >40% of world capacity.

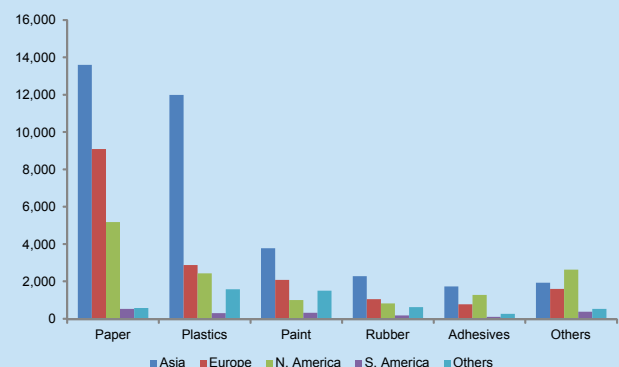
In paint, calcium carbonate is the main extender mineral used both to reduce consumption of higher cost pigments, such

as titanium dioxide, and to impart opacity and brightness, mainly to architectural coatings. Calcium carbonate consumption in this market was 8.8Mt in 2011, with GCC accounting for 7Mt (35% in Asia) and PCC for 1.8Mt (76% in Asia).

Global combined capacity for GCC and PCC exceeds 100Mtpy. GCC capacity of >80Mtpy is spread through more than 70 countries, reflecting the widespread availability of marble and limestone raw materials. PCC capacity is more concentrated than that of GCC on a national level. Total PCC capacity identified by Roskill is >17Mtpy, with China accounting for nearly half and the USA for a further 17%.

This report gives you a full analysis of the key trends, issues and developments in the market, a clear insight into all areas of the industry and an authoritative analysis of its prospects.

World: Estimated regional consumption of GCC and PCC by end use, 2011 (Mt)



1. TYPES, RESOURCES AND CHEMISTRY OF CALCIUM CARBONATE ROCKS
2. CHEMICAL AND PHYSICAL PROPERTIES OF GCC AND PCC
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4. PRODUCTION METHODS OF PCC
5. WORLD GCC AND PCC CAPACITY AND PRODUCTION
6. PRODUCTION OF PCC AND GCC BY COUNTRY
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