

The Economics of Kaolin

Twelfth Edition, 2006

**Read the definitive report on the global kaolin industry, its
markets and its future**

What this report gives you:

- Independent, in-depth research and analysis
- Essential market intelligence for successful business planning
- Detailed survey of production and processing in 62 countries
- Up-to-date profiles of the activities of over 170 kaolin producing and processing companies, including Imerys, BASF (Engelhard Corp.), J.M. Huber, Thiele Kaolin and CVRD
- Forecasts for end-use consumption & world supply & demand

A valuable resource for:

- Chief executives
- Market researchers
- Information centres
- Strategic planners
- Financial analysts
- Product developers

Capacity expansions make Brazil the second largest kaolin producer

The kaolin industry has been suffering from increased competition in its main market, paper, since the 1990s. This has led to poor profitability for many producers. The industry is responding to this situation by effecting structural changes, including capacity closures in the USA and UK and expansions in Brazil. Output is concentrated in relatively few countries (USA, China, Brazil, UK and the Czech Republic), which account for 66% of the total. US production grew by an average of 1.2%py from 5.4Mt in 1973 to 7.8Mt in 2005, while Brazilian output rose by an average 10.1%py between 1990 and 2005. Global consumption of kaolin is estimated at 23Mt in 2005. The largest market is as an extender or filler, mainly in paper and paint. These markets used an estimated 13.75Mt or 62.5% in 2005. The main threat facing kaolin in paper is its cost compared to that of alternative minerals, especially calcium carbonate. However, kaolin is increasingly used in conjunction with calcium carbonate to produce high quality printing and writing paper. World paper and board production is forecast to rise by an average 3%py up to 2010, with printing and writing paper output expanding by 4.5%py over the same period. Rising paper production will consume more minerals but much of the increase, especially in filler applications, will be of calcium carbonate rather than kaolin. As a result kaolin demand in this sector is expected to grow at 1%py to 2010.

The key trends, issues and developments in the market are analysed in this major new report from Roskill. It provides a clear insight into the industry and its trends, and an authoritative analysis of the prospects for the future.

Report Highlights

Global kaolin capacity is estimated at 27-30Mtpy, with six companies each controlling more than 1Mtpy, of which Imerys of France is by far the largest controlling an estimated 5.9Mtpy. These companies control over half of all capacity. Ownership of capacity in developed countries has become steadily more concentrated because of low profitability and pressure from consumers for higher specification products.

Kaolin is an integral part of many traditional ceramics but is mainly used in whitewares such as sanitaryware, floor and wall tile, tableware and decorative ceramics. Kaolin use in sanitaryware and tiles will expand most rapidly in Asia and Latin America because of population and per capita growth. Growing markets are in proppants used in oil and gas wells and supports for catalysts in the oil and gas industry. Overall, the use of kaolin in traditional ceramics is forecast to rise by an average of 1%py to 2010.

Kaolin is used in the manufacture of reinforcing fibreglass. Production of fibreglass is concentrated in the USA, EU and Japan. The world market for reinforcement fibreglass has been growing at 3-4%py, and is expected to continue, with demand for kaolin in this application forecast to rise by 3%py to 2010.

The steel industry is the main market for refractories but refractory clays have been largely replaced with higher alumina products such as mullite, calcined bauxite and tabular alumina. Kaolin consumption in this sector is expected to decline in developed economies and rise in industrialising ones.

In 2005, exports of kaolin from USA, UK and Brazil were reported as almost 6.8Mt compared with an estimated world production of 22.9Mt. This pattern is expected to continue, but shipments from Brazil are taking market share in the paper sector from producers in the USA and UK.

Sources and Methodology

This report is the result of an extensive programme of research by Roskill analysts. They have conducted a close appraisal of information from a wide variety of sources, including governments, trade associations, company sources, official organisations, trade journals and technical literature.

Information gathering is only the first step in preparing a report. The data is then extensively analysed so that the finished report provides a comprehensive insight into the industry today, as well as top-level analysis of the long-term prospects.

Authoritative research in this report can help you:

- Explore commercial opportunities
- Gather intelligence on your competitors
- Strengthen your business capabilities
- Plan your materials buying & sourcing
- Assess key trends and growth areas
- Establish sales targets for your products
- Analyse company market share
- Save time searching for specialist information
- And improve your results

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A full list of tables and figures can be found at www.roskill.co.uk