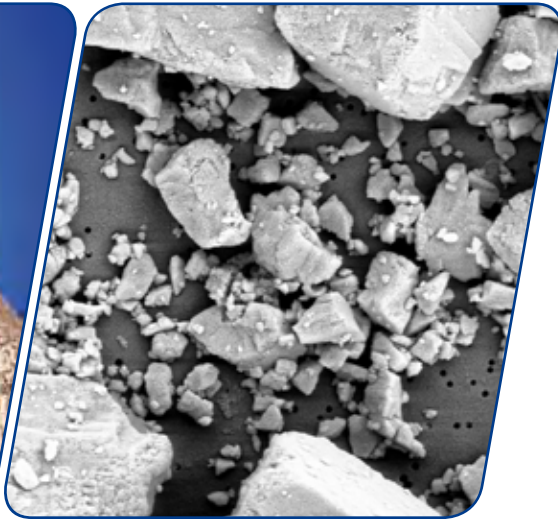
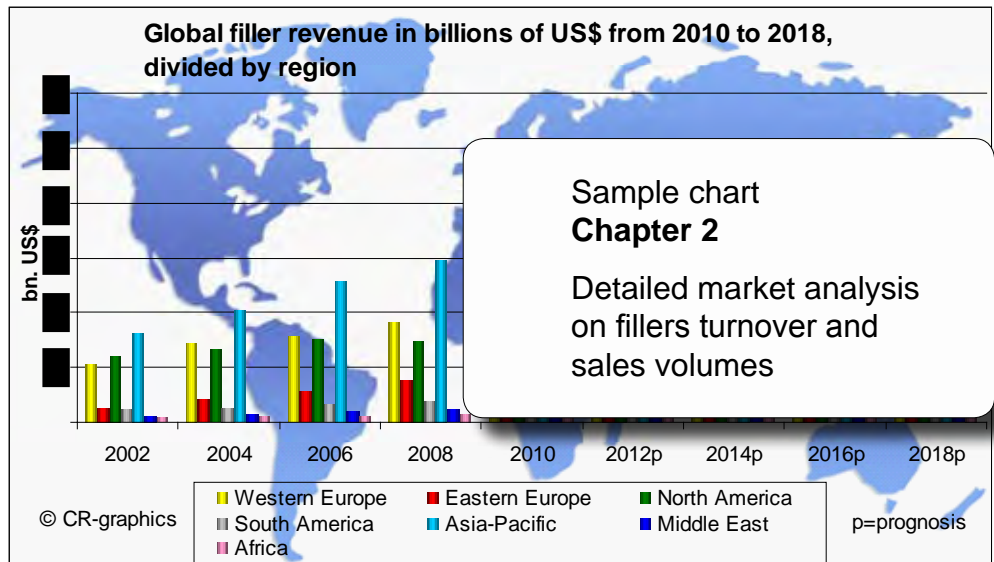


# Market Study: Fillers



**Ceresana  
Research**

# Market Study: Fillers



Ceresana Research estimates that the global filler market will earn revenues of approximately US\$22.5 billion in 2018. In 2010, the Asia-Pacific was the largest sales market, generating about 45% of the worldwide demand for fillers. The region was followed by Western Europe and North America. The use of fillers in plastics is expected to continue to account for the largest share of demand. Paper production, which generated the second-largest demand for fillers during 2010, will see the lowest growth over the next eight years. We forecast the global elastomer industry will, for the first time, have a larger demand for fillers than the paper industry from 2014 onwards.

Fillers are used in a wide variety of applications due to their economic advantage. As low priced substitutes or supplements for the usually more expensive carrier material, they cut the overall price of products. Today, the main task of modern fillers is to change or improve the technical properties of materials.

Another trend is that the filler market is partially shifting from North America and Western Europe to Asia-Pacific (ex Japan) in particular, but also to South America and Eastern Europe. One reason for this is that the latter regions have large mineral deposits that are exploited at low costs. Moreover, the plastics, elastomer and paper production outside the major industrial nations saw dynamic growth during past years, and this trend will continue over the next years. As a result, companies cover their demand for raw materials – especially for fillers – via local suppliers because long distance transports are usually not cost-efficient.

Downstream products containing fillers represent a diversified application area – from paper, plastics, and elastomers to paints & varnishes, adhesives and sealants. Accordingly, the demand for fillers parallels the overall economic development of a country. Ceresana expects the global filler market to see average growth rates of 2.5% per year by 2018. We forecast the Asia-Pacific to continue to significantly influence market dynamics over the next years. Rapidly developing emerging markets have the greatest growth potential, above all China and India. Moreover, South America and the Middle East register above-average growth of 2.9% to 4.2%.

Ground calcium carbonate (GCC) fillers, used in numerous plastics, register strong growth worldwide. Many emerging countries still have a low per-capita consumption of plastics, which will, however, increase considerably over the mid-term. The demand for carbon black and talc does also record above-average growth.

The demand for the different types of fillers develops differently from region to region. While Europe will see the use of synthetically produced PCC increase the most, the recovery of the rubber industry in North America has generated stronger demand for carbon black. In the other world regions, the most widely used GCC fillers continue to see the biggest gains.

## The Study in Brief:

Volume I / Chapter 1: Summary of the most important facts about the different types of fillers, their classification, characteristics, raw materials, production, and application areas.

Chapter 2: Presentation and analysis of the filler market – including forecasts up to 2018: Demand divided by product types as well as revenues and prices.

In addition, you get a comprehensive insight in the development of individual regions and global market dynamics.

Chapter 3: In-depth analyses of 26 countries: Demand for fillers, filler revenues, and their influencing factors. Essential market data related to the application areas.

Chapter 4: Analysis of the demand for fillers worldwide and in the 7 world regions (Western Europe, Eastern Europe, North America, South America, Asia-Pacific, Middle East, and Africa). Fields of application include: Paper, Plastics, Paints & Varnishes, Elastomers, and Adhesives & Sealants.

Volume II / Chapter 5: 339 profiles of filler manufacturers – clearly arranged according to contact data, turnover, profit, product range, production sites, profile summary, product base, fields of application, and brand names.

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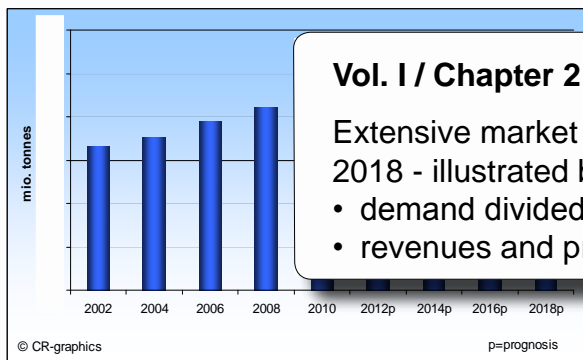
2.5.1 Demand – South America

The demand for fillers in South America was X million tonnes in 2002. Following an average annual increase of X%, demand rose to approximately X million tonnes in 2010 (Graph). We anticipate seeing continued growth in South American demand for fillers at an average rate of X% per year between 2010 and 2018, resulting in an estimated X million tonnes in 2018.

Due to its booming plastic industry, Brazil is the largest and most dynamic sales market within South America. About X% of South American demand for fillers is accounted for by Brazil (Table). Due to above-average growth rates in almost all application areas, Brazil will expand its share at the expense of the other South American countries over the next eight years.

Country	2002	2010	2018p
Brazil	X%	X%	X%
Argentina	X%	X%	X%
Others	X%	X%	X%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Table: Various countries' shares in South American demand for fillers from 2002 to 2018



Graph: Demand for fillers in South America from 2002 to 2018

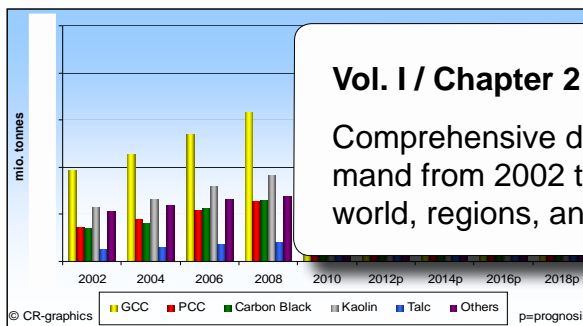
Vol. I / Chapter 2

Extensive market data from 2002 to 2018 - illustrated by graphs and tables:

- demand divided by types of fillers
- revenues and prices

2.3.3 Demand Divided by Types of Fillers – Eastern Europe

With X million tonnes, GCC was the most widely used filler during 2010 (Graph). Accordingly, GCC accounted for X% of all demand for fillers in Eastern Europe (Table). This is not expected to change by 2018. In contrast, PCC will increase its share of demand by X percentage points to X%, following average growth rates of X% per year. As a result, the demand for PCC will amount to approximately X tonnes in 2018. All other types of fillers will lose some of their market shares due to below-average growth. A slightly above-average increase of X% per year will only be achieved by those fillers classified as others. Feldspar accounts for about half of all other fillers in Eastern Europe. Ceresana forecasts that feldspar will lose X percentage points of its share in demand for other fillers during the next eight years. Consequently, demand will amount to approximately X tonnes of feldspar in 2018.



Graph: Demand for fillers in Eastern Europe from 2002 to 2018 – divided by types of fillers

	2002	2010	2018p
GCC	X%	X%	X%
PCC	X%	X%	X%
Carbon Black	X%	X%	X%
Kaolin	X%	X%	X%
Talc	X%	X%	X%
Others	X%	X%	X%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Table: Shares in East European demand for fillers from 2002 to 2018, divided by fillers

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Comprehensive data and facts on demand from 2002 to 2018 - divided by world, regions, and countries

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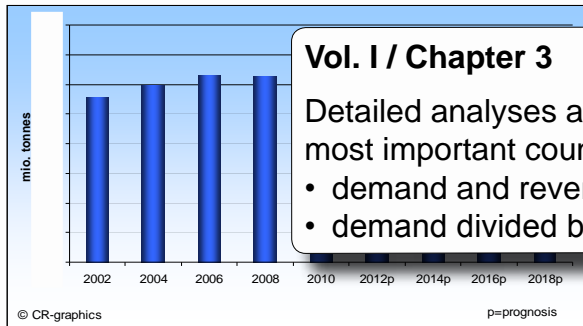
4.6 Asia-Pacific

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3.1.2 Germany

The demand for fillers in Germany was about X million tonnes in 2010 (Graph). Thus, the demand for X million tonnes seen in 2002 had gone up at an average annual rate of X% by 2010. With an X% share, Germany is the largest filler market in Western Europe. The demand in Germany mainly increased due to growth in the fields of paper, plastics, and adhesives and sealants (Table). The use of fillers for manufacturing paints & varnishes registered only sluggish growth between 2002 and 2010. With an X% share, paper was the most important application area in 2010. Primarily kaolin (X%), PCC (X%) and GCC (X%) were in demand in the paper industry.



Graph: Demand for fillers in Germany from 2002 to 2018

in million tonnes	2002	2004	2006	2008	2010	2012p	2014p	2016p	2018p
Paper	X	X	X	X	X	X	X	X	X
Plastics	X	X	X	X	X	X	X	X	X
Paints & varnishes	X	X	X	X	X	X	X	X	X
Elastomers	X	X	X	X	X	X	X	X	X
Adhesives & sealants	X	X	X	X	X	X	X	X	X
<b>Total</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>

Table: Demand for fillers in Germany from 2002 to 2018, divided by application

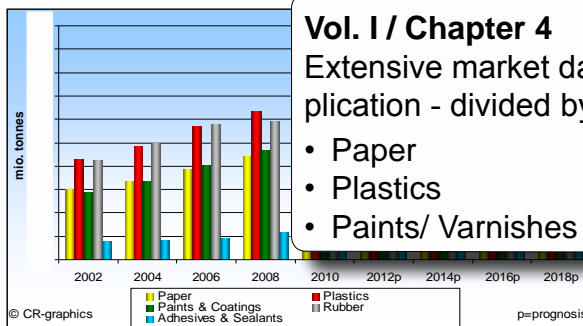
Vol. I / Chapter 3

Detailed analyses and forecasts for the 26 most important countries:

- demand and revenue
- demand divided by filler types

4.6 Market Data Applications – Asia-Pacific

The demand for fillers in the Asia-Pacific amounted to approximately X million tonnes in 2010, whereof plastic manufacturers had the largest share (Graph). All in all, about X million tonnes were used in plastic processing, which accounts for X% of the overall market. The demand for fillers used to produce elastomers was the second-largest market with a X% share, followed by paints & varnishes (X%), paper (X%), and adhesives & sealants (X%). We expect the demand for fillers in Asia-Pacific to rise at an average annual rate of X% over the next eight years. Accordingly, demand is anticipated to amount to about X million tonnes in 2018.



Graph: Demand for fillers in Asia-Pacific from 2002 to 2018 – divided by application

Vol. I / Chapter 4

Extensive market data on the fields of application - divided by the 7 world regions:

- Paper
- Plastics
- Paints/ Varnishes
- Elastomers
- Adhesives/ Sealants

4.6.1 Paper

In the Asia-Pacific, the use of fillers in paper manufacturing increased from about X million tonnes in 2002 to X million tonnes in 2010, translating to an average annual growth of X% (Graph). China accounted for approximately X% of the overall Asian-Pacific demand in 2010 (Table).

We forecast China and India will see the greatest growth rates of about X% annually within the Asia-Pacific over the next eight years. Thus, both countries will be able to expand their shares by X and X percentage points until 2018.

We anticipate demand in Asia-Pacific will increase at an average annual rate of X% to approximately X million tonnes by 2018. With a X% share, PCC was the most widely used filler in paper manufacturing during 2010, followed by talc (X%) and GCC (X%) (Table).

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  - South Africa (2)

Quarzwerke GmbH - HPF The Mineral Engineers			
Kaskadenweg 40			
50226 Frechen			
Germany			
Tel.	49 2234 101 411		
Fax	49 2234 101 400		
Web	www.hpfminerals.com		
E-Mail	sales@hpfminerals.com		
Financial Key Data			
(in million €)	2007	2008	
Turnover	111	112	
Profit	n.a.	n.a.	
Divisions, Product Range	The company operates in the following <ul style="list-style-type: none"> <li>• Quartz: Division 1 concentrates on quartz sand, quartz flour, and Austria.</li> <li>• Kaolin, feldspar: Division 2 (Amber) core markets of kaolin and feldspar.</li> <li>• High Performance Fillers: Division performance fillers for polymers.</li> <li>• Central and Eastern Europe: Division Europe, but covers the entire product range.</li> </ul>		
Production Sites	The company's 23 production sites European countries.		
Profile Summary	In 1884, two contractors established a quartz sand trading company to supply quartz sands from Frechen. The company first supplied grit for railways and soon also supplied quartz sand to the glass industry and foundries. Quarzwerke is a European producer of mineral raw		

Vol. II / Chapter 5

Extensive company profiles for 339 manufacturers, as for example Aditya Birla Group, Ashapura Group, Baek Kwang Mineral Products, Cabot, Carmeuse, Huber Engineered Materials, Imerys Group, Maruo Calcium, Minelco Group, Nordkalk, Omya Group, Orion Engineered Carbons, Phillips Carbon Black, Quarzwerke, Sibelco Group, Solvay, Specialty Minerals und Tokai Carbon Co.

Note: The profiles are assigned to the country in which the company or holding is headquartered. Company profiles also include JVs and subsidiaries.

materials. The focus is on the extraction, processing, and refining of industrial minerals, especially quartz, kaolin, feldspar, wollastonite, and mica. The company's products are exported to 50 countries and mainly used in the paper, glass, foundry, ceramic, and other industries as well as in paints & coatings and other products. Quarzwerke is ISO 9001 and ISO 14001 certified.		
Fillers		
Product Basis	<input type="checkbox"/> GCC <input checked="" type="checkbox"/> Feldspar <input checked="" type="checkbox"/> Kaolin <input type="checkbox"/> Graphite <input checked="" type="checkbox"/> ATH <input type="checkbox"/> MDH	<input type="checkbox"/> PCC <input checked="" type="checkbox"/> Mica <input type="checkbox"/> Barium sulphate <input type="checkbox"/> Carbon black <input checked="" type="checkbox"/> Others: Wollastonite, cristobalite
Fields of Application		
<input checked="" type="checkbox"/> Paper <input checked="" type="checkbox"/> Plastics: Films <input checked="" type="checkbox"/> Resins <input checked="" type="checkbox"/> Paints and Varnishes <input checked="" type="checkbox"/> Adhesives and sealants		
Fillers, Applications		
Kaolin for paper, ceramics, rubber, paints, and adhesives		Chir...
Quartz for ceramics, paints, and resins		MILLISIL, SEPASIL, SIKRON, SILBOND, SILMIKRON, AMOSIL
Wollastonite for plastics, elastomers, and varnishes		Tremin 283, 939
Cristobalite for paints and sealants		SILBOND, SILMIKRON
Mica for thermoplastics and paints		Muscovit Mica, TREMICA, Phlogopit, TREFIL

Vol. II / Chapter 5

Clearly arranged data and facts on the most important producers and niche manufacturers:

- Contact details
- Turnover and earnings
- Product range
- Production sites
- Profile summary
- Product basis and fields of application
- Filler types, applications, and brand names

## 6 reasons to order now

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Detailed profiles offer you precise facts about producers, applications, characteristics, and demand of the most important products.

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Our clearly structured studies offer you all essential information at a glance.

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## About Ceresana

We are one of the world's leading market research institutions. In addition to multi-client studies, we also offer commissioned studies according to an individual client's specifications.

Our core competencies include: Chemicals, plastics, additives, commodities, industrial components, packaging, and construction materials.

Several 1,000 companies, institutions, and associations from more than 45 countries have already profited from our global market data and prognoses.

## This study is especially useful for:

- Manufacturers, traders and processors of fillers: Ground calcium carbonate, precipitated calcium carbonate, carbon black, kaolin, talc, silica, feldspar, barite, wollastonite, and aluminum trihydroxide
- Companies from the fields of: Paper, plastics, elastomers, foams, insulating materials, construction materials, adhesives, sealants, paints and varnishes, cables, electrical and electronics, packaging, and transport industry
- Investors and analysts
- Authorities and organizations
- Associations and institutes
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- Purchasing
- Import / export

## Up-to-date Studies

More Info: Click on headlines!

### [Fillers \(new\)](#)

21 Products; 339 Producers; 1,028 Pages, 132 Graphs, 160 Tables; 09/11

### [Benzene](#)

35 Countries, 143 Producers; 2 Vol., 700 P., 215 Graphs, 125 Tables; 07/11

### [Paints and Varnishes](#)

30 Countries, 138 Producers; 2 Vol., 575 P., 129 Graphs, 56 Tables; 04/11

### [Propylene](#)

51 Countries, 137 Producers; 2 Vol., 760 P., 257 Graphs, 137 Tables; 01/11

### [Polyethylene - LDPE](#)

67 Countries, 87 Producers; 2 Vol., 850 P., 300 Graphs, 100 Tables; 04/10

### [Bioplastics](#)

7 Countries; 12 Products, 77 Producers; 400 P., 80 Graphs, 32 Tables; 06/09

### [Polypropylene](#)

64 Countries; 101 Producers; 2 Vol., 1,030 P., 313 Graphs, 118 Tables; 06/08

### [Antioxidants](#)

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### [Plasticizers \(new\)](#)

19 Products; 213 Producers; 842 Pages, 188 Graphs, 134 Tables; 05/11

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31 Countries, 199 Producers; 2 Vol., 870 P., 133 Graphs, 48 Tables; 03/11

### [Ethylene](#)

55 Countries, 117 Producers; 2 Vol., 801 P., 288 Graphs, 191 Tables; 12/10

### [Expandable Polystyrene](#)

64 Countries, 63 Producers; 2 Vol., 690 P., 287 Graphs, 87 Tables; 03/10

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61 Countries, 122 Producers; 2 Vol., 977 P., 364 Graphs, 108 Tables; 11/08

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### [Plastic Pipes](#)

30 Countries, 135 Producers; 2 Vol., 590 P., 131 Graphs, 101 Tables; 03/11

### [Plastic Caps](#)

31 Countries, 379 Producers; 2 Vol., 1,100 P., 139 Graphs, 72 Tables; 09/10

### [Polyethylene - LLDPE](#)

67 Countries, 80 Producers; 2 Vol., 830 P., 305 Graphs, 100 Tables; 03/10

### [Polyethylene - HDPE](#)

65 Countries, 100 Producers; 2 Vol., 994 P., 285 Graphs, 99 Tables; 09/08

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| <input type="checkbox"/> Biocides                               | <input type="checkbox"/> Paints and Varnishes                      | <input type="checkbox"/> Stabilizers                              |
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