Market Study: Fillers

World Report (6th edition)

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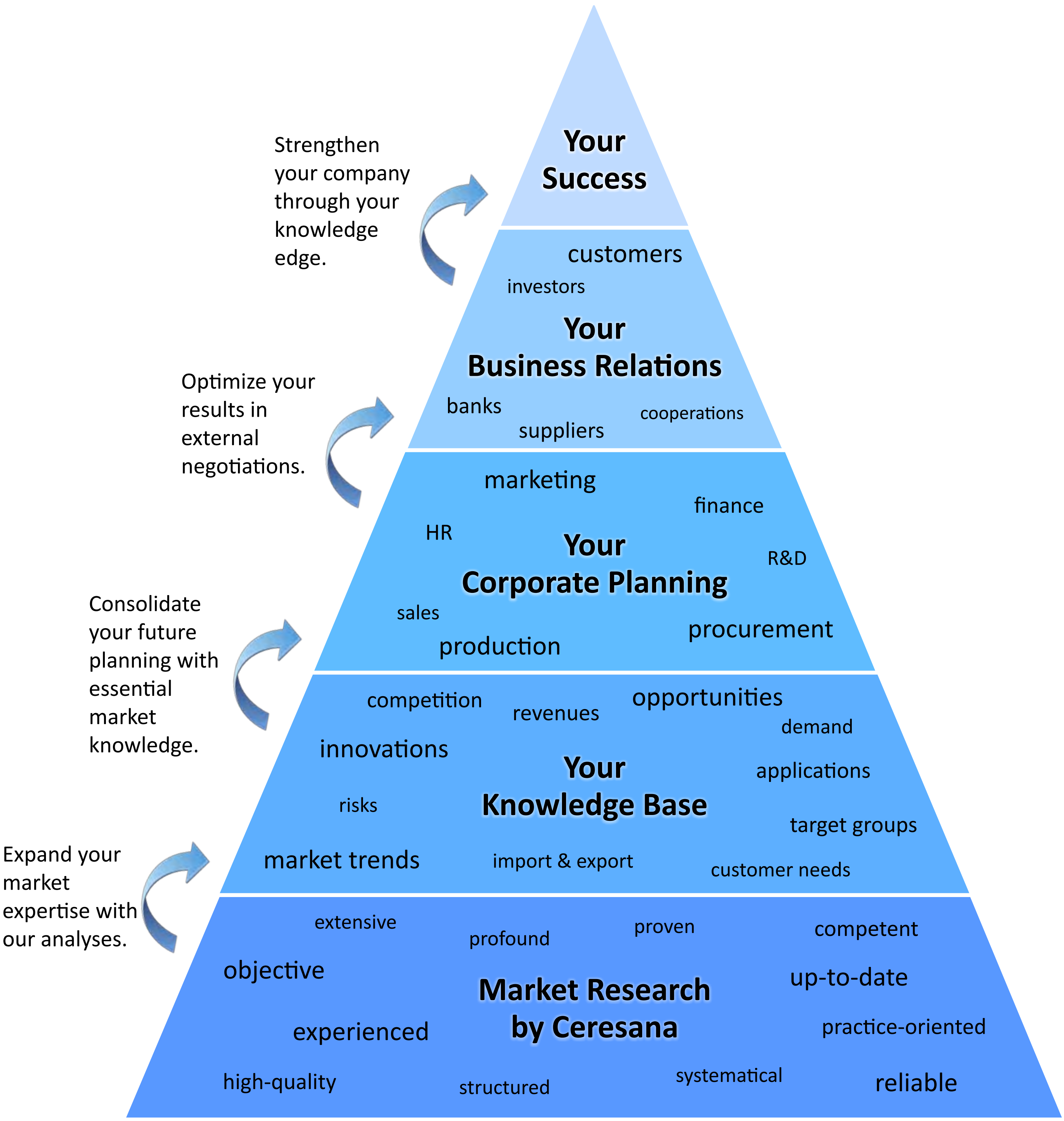

This brochure provides further information on the study “Fillers - World (6th edition)”

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1 Market Data: World and Regions

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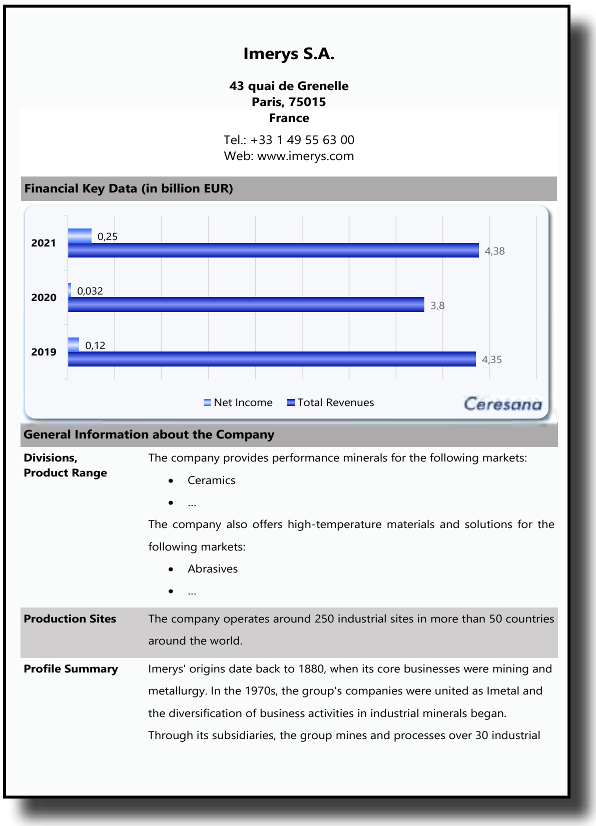
2 Market Data: Country Profiles

(For each country: data on revenues, demand, applications, product types)

3 Company Profiles*



Imerys S.A.

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France

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Financial Key Data (in billion EUR)

General Information about the Company

Divisions, Product Range	The company provides performance minerals for the following markets: • Ceramics • ... The company also offers high-temperature materials and solutions for the following markets: • Abrasives • ...
Production Sites	The company operates around 250 industrial sites in more than 50 countries around the world.
Profile Summary	Imerys' origins date back to 1880, when its core businesses were mining and metallurgy. In the 1970s, the group's companies were united as Imetal and the diversification of business activities in industrial minerals began. Through its subsidiaries, the group mines and processes over 30 industrial

minerals for a large range of applications. Imerys is listed on the Euronext Paris. In 2021, the company held total assets amounting to EUR 7 billion and employed 16,900 people worldwide.

Divided by business segments, 54 % of revenues 2021 were generated with performance minerals, and 46% with high temperature materials & solutions. In February 2018, Imerys acquired the carbonate business of Vimal Mircrons, an Indian producer of ground calcium carbonates. In October 2018, Imerys completed the sale of its roofing division to an affiliate of Lone Star Funds, a global equity firm, for an enterprise value of EUR 1 billion. In 2019, Imerys disposed of its ceramic proppants business (IOS) in the US and its plastics recycling business (Imerplast) in the UK. The company acquired certain assets from EDK (a leading producer of Ground Calcium Carbonate) in Brazil, as well as a 65% stake in Shandong Luxin Mount Tai, the foremost producer of abrasive grains in China...

In 2020, Imerys acquired a 60% majority stake in the Haznedar group (Turkish supplier of high-quality refractory bricks and monolithic products), a 100% stake in Cornerstone and American Garden Perlite (horticulture and industrial grade perlite mining and transformation in the US), a 75.9% stake in Sunward (manufacturer of high-grade monolithic refractories and refractory bricks in Taiwan and Asia) and a 100% stake in Hysil (major manufacturer of calcium silicate blocks in India). Imerys also disposed of its Kaolin business in ....

Specific Information about Fillers

Imerys' minerals division produces precipitated calcium carbonate (PCC) and ground calcium carbonate (GCC), to address the local paper and packaging industries.

The minerals division also produces carbon black and conductive carbon black, which is used for example in polymers and batteries. The company also offers feldspar, mica, talc and wollastonite, diatomite, perlite or vermiculite, which are used for a wide range of applications that require advanced technical specifications such as the automotive, paint, rubber, paper, hygiene, health, and beauty industries.

The kaolin division manufactures a full range of kaolin products for the paper and packaging, paints, plastics or polymers, adhesives and sealants as well as ceramic industries....

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

Summary

Chapter 1 provides a description and analysis of the global filler market - including forecasts up to 2030: it outlines the demand and revenues of fillers for each region of the world.

These product types are examined in detail:

- GCC
- PCC
- Carbon black
- Kaolin
- Talc
- Other fillers.

Additionally these application areas are analyzed:

- Plastics
- Elastomers
- Paper
- Paints and coatings
- Adhesives and sealants.

Chapter 2 offers information regarding the revenues and demand for fillers in the 16 largest national markets. The demand is broken down into individual applications and product types. Additionally, the demand for product types is analyzed for each application area.

Chapter 3 provides useful company profiles of the most important filler manufacturers, structured according to contact details, revenues, profit, product range, production sites, brief profile as well as product types.
Detailed profiles are provided by 113 manufacturers, such as 20 Microns Ltd., Huber Engineered Materials, Imerys SA, Kärntner Montanindustrie GmbH (KMI), Lhoist S.A., LKAB Minerals AB, Minerals Technologies Inc., Omya International AG, and Quarzwerke GmbH.

2.3.3 USA

In 2020, demand for fillers in the USA was around X million tonnes. Globally, the USA represents the second largest domestic market after China. We expect the market volume to increase to approx. X million tonnes by 2030. Based on 2020, this corresponds to an average increase of X% per year.

Revenues generated with fillers amounted to around USD X billion in 2020. By 2030, we expect this figure to increase to around USD X billion. Compared to 2020, this represents an average growth rate of X% per year.

In 2020, plastics represented the largest submarket. Between 2020 and 2030, demand in the elastomers application area is expected to experience the highest growth rate.

Revenues	2018	2019	2020	2021p	2022p	2023p	2024p	2025p	2030p	2020-2030
billion USD	X	X	X	X	X	X	X	X	X	X% p.a.
billion EUR	X	X	X	X	X	X	X	X	X	X% p.a.

Table: Revenues generated with fillers in the USA from 2018 to 2030 in billion USD and billion EUR

in 1,000 tonnes	2018	2019	2020	2021p	2022p	2023p	2024p	2025p	2030p	2020-2030
Paper	X	X	X	X	X	X	X	X	X	X% p.a.
Plastics	X	X	X	X	X	X	X	X	X	X% p.a.
Paints and Coatings	X	X	X	X	X	X	X	X	X	X% p.a.
Elastomers	X	X	X	X	X	X	X	X	X	X% p.a.
Adhesives and Sealants	X	X	X	X	X	X	X	X	X	X% p.a.
Total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X% p.a.**

Table: Demand for fillers in the USA from 2018 to 2030 – split by application

in 1,000 tonnes	2018	2019	2020	2021p	2022p	2023p	2024p	2025p	2030p	2020-2030
GCC	X	X	X	X	X	X	X	X	X	X% p.a.
PCC	X	X	X	X	X	X	X	X	X	X% p.a.
Carbon Black	X	X	X	X	X	X	X	X	X	X% p.a.
Kaolin	X	X	X	X	X	X	X	X	X	X% p.a.
Talc	X	X	X	X	X	X	X	X	X	X% p.a.
Other	X	X	X	X	X	X	X	X	X	X% p.a.
Total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X% p.a.**

Table: Demand for fillers in the USA from 2018 bis 2030 – split by types of fillers

in 1,000 tonnes	2018	2019	2020	2021p	2022p	2023p	2024p	2025p	2030p	2020-2030
Paper	X	X	X	X	X	X	X	X	X	X% p.a.
Plastics	X	X	X	X	X	X	X	X	X	X% p.a.
Paints and Coatings	X	X	X	X	X	X	X	X	X	X% p.a.
Elastomers	X	X	X	X	X	X	X	X	X	X% p.a.
Adhesives and Sealants	X	X	X	X	X	X	X	X	X	X% p.a.
Total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X% p.a.**

Table: Demand for GCC in the USA from 2018 to 2030 – split by applications

in 1,000 tonnes	2018	2019	2020	2021p	2022p	2023p	2024p	2025p	2030p	2020-2030
Paper	X	X	X	X	X	X	X	X	X	X% p.a.
Plastics	X	X	X	X	X	X	X	X	X	X% p.a.
Paints and Coatings	X	X	X	X	X	X	X	X	X	X% p.a.
Elastomers	X	X	X	X	X	X	X	X	X	X% p.a.
Adhesives and Sealants	X	X	X	X	X	X	X	X	X	X% p.a.
Total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X% p.a.**

Table: Demand for PCC in the USA from 2018 to 2030 – split by application

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Thank you for your trust!

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- Bioplastics - World
- Polylactic Acid (PLA) - World
- Starch Based Plastics - World

Chemicals

- Biocides - World
- Carbon Black - World
- Chelating Agents - World
- Fillers - Europe
- Fillers - World
- Flame Retardants - World
- Pigments - World
- Plastic Additives - World
- Plasticizers - World
- Solvents - World
- Stabilizers - World
- Surfactants - World
- Titanium Dioxide (TiO2) - World

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- Adhesives - World
- Insulation Material - Europe
- Insulation Material - World
- Paints & Coatings - Europe
- Paints & Coatings - World
- Plastic Extrusion - Europe
- Plastic Injection - Europe
- Plastic Pipes - Europe
- Plastic Pipes - World
- Plastic Windows - World
- Printing Inks - Europe
- Printing Inks - World
- Windows & Doors - Europe

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- Expandable Polystyrene (EPS) - World
- Masterbatches - World
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- Polyethylene (HDPE) - World
- Polyethylene (LDPE) - World
- Polyethylene (LLDPE) - World
- Polypropylene - World
- Polystyrene & EPS - World
- Polyvinyl Chloride (PVC) - World
- Silicones - World
- Synthetic Rubber - World
- Thermoplastic Elastomers (TPE) - World

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- Bags, Sacks & Pouches - World
- Corrugated Board & Solid Board - Europe
- Flexible Packaging - Europe
- Food Packaging - Europe
- Labels - Europe
- Plastic Caps & Closures - Europe
- Plastic Caps & Closures - World
- Plastic Containers - Europe
- Plastic Films - Europe
- Plastic Films - World
- Plastic Packaging for Cosmetics - Europe
- Rigid Metal Packaging - Europe
- Rigid Plastic Packaging - World