Strategic Growth Opportunities in Ground and Precipitated Calcium Carbonate (GCC & PCC) Market

PRESENTED BY
Lucintel

DATE
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Global GCC and PCC Market is Expected to Reach $24.8 billion by 2025 with a CAGR of 3%


Value (US $B)

- 2014: $16.7
- 2019: $20.5
- 2025: $24.8

Source: Lucintel

Opportunities for GCC & PCC Market by Various Product type, Application, and End Use Industry

<table>
<thead>
<tr>
<th>Product Type</th>
<th>Application</th>
<th>End Use Industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ground Calcium Carbonate (GCC)</td>
<td>Paper</td>
<td>Packaging</td>
</tr>
<tr>
<td>Precipitated Calcium Carbonate (PCC)</td>
<td>Plastics</td>
<td>Building &amp; construction</td>
</tr>
<tr>
<td></td>
<td>Paint &amp; Coating</td>
<td>Printing</td>
</tr>
<tr>
<td></td>
<td>Rubber</td>
<td>Transportation</td>
</tr>
<tr>
<td></td>
<td>Adhesive &amp; Sealant</td>
<td>Industrial</td>
</tr>
<tr>
<td></td>
<td>Others</td>
<td>Consumers</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Others</td>
</tr>
</tbody>
</table>
In terms of Overall Opportunity, GCC and PCC Market Represents ~85% in the Global Filler Market.


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<thead>
<tr>
<th></th>
<th>2014</th>
<th>2019</th>
<th>2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>$19.7B</td>
<td>$24B</td>
<td>$28.9B</td>
</tr>
<tr>
<td>CAGR</td>
<td>15.5%</td>
<td>14.9%</td>
<td>14.0%</td>
</tr>
<tr>
<td>Market</td>
<td>84.5%</td>
<td>85.1%</td>
<td>86.0%</td>
</tr>
</tbody>
</table>

CAGR (2019-2025)

- Other Filler Market: ~2%
- GCC & PCC Market: ~3%

Source: Lucintel

Other Fillers Include, Talc, Mica, Kaolin, Wollastonite, etc.
In this market, packaging is the largest end use industry, whereas paper is the largest segment by application type.
In Terms of Regions, APAC Provides the Largest Opportunity for GCC and PCC Market, followed by Europe and North America.

Oppunities for Ground and Precipitated Calcium Carbonate in following top countries are identified in this report:

- USA
- Mexico
- Canada
- Germany
- Italy
- Spain
- China
- Japan

Source: Lucintel
Ecosystem of the Ground and Precipitated Calcium Carbonate Market is Composed of Diverse Group of Companies

Mining Companies

GCC and PCC Manufacturers

Plastic Compound / Intermediate Products

End Users
(Paper, Wire & Cable, Pipe Manufacturers)

Source: Lucintel
Growth in Construction Industry, Low Cost, and Easy Availability are the Major Drivers in This Market

<table>
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<tr>
<th>Key Drivers</th>
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<tbody>
<tr>
<td><strong>Growth in Construction Industry:</strong> The global construction industry is expected to drive the demand for coatings, wire &amp; cable, and pipes &amp; profiles, which in turn will drive the demand for CaCO3</td>
</tr>
<tr>
<td><strong>Low Cost and Easy Availability:</strong> Calcium carbonate is present in abundance and is low cost compared to other fillers, such as talc and kaolin</td>
</tr>
<tr>
<td><strong>Cost Saving and Performance Benefits:</strong> CaCO3 is used as a filler and extender in plastics, coatings, rubber, and various other applications to reduce part cost and to provide functional properties</td>
</tr>
</tbody>
</table>

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<th>Key Challenges</th>
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<td><strong>Transportation Cost:</strong> Transportation cost becomes significant when the distance between mining and processing facilities is longer</td>
</tr>
<tr>
<td><strong>Energy Cost:</strong> Rising energy cost is key challenge for the calcium carbonate mining and processing</td>
</tr>
<tr>
<td><strong>COVID-19:</strong> Coronavirus is having significant impact on world economy. Market will witness negative growth in the year 2020 due to economic recession led by COVID-19. It is expected that market will recover from the year 2021</td>
</tr>
</tbody>
</table>

Source: Lucintel
Developing Capabilities in Ultrafine PCC Provides Strategic Growth Path

Strategic Considerations in Ground and Precipitated Calcium Carbonate Market

- Players of calcium carbonate market can expand their capabilities into other mineral filler markets, such as talc, kaolin, etc.
- Increase in capabilities to produce ultrafine precipitated calcium carbonate (PCC) for food, nutritional supplements, pharmaceutical and personal care product
- Investment to increase competencies in advanced technologies to improve product performance and enhance physical properties
- Research and development activities to reduce production cost

- Strategic collaborations / acquisitions to increase geographical presence in growing countries like China and India
- Develop alliances to penetrate in new applications
- Collaborative activities to develop advanced products for green applications

Source: Lucintel
These Insights are Based on Below Market Report from Lucintel. It can help you Identify New Opportunities by Various Segments and Regions


Note: These insights are based on recently launched Lucintel’s Report on Ground and Precipitated Calcium Carbonate Market, which has 150+ Page and over 100+ charts and tables. Lucintel also offers 10% free customization on above report based on your needs.
Lucintel has an Extensive Toolkit to Address Strategic Questions

Key Questions

- Is market space / opportunity of current product offerings sufficiently robust?
- Market is focus for many: how can my company profitably differentiate?
- Based on our core skills, where should we focus?
- Should we build or buy? Is build even an option?
- What game changer actions exist and/or is a more incremental approach best?
- What is the order sequence of market entry segments / products?
Lucintel - At a Glance

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- Management comprised of PhDs, MBAs, and subject matter experts. Head quarter in Dallas, USA.

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- Growth finance
- Strategic consulting
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- Due diligence
- M & A services

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**Strategic advice:** Over 20 years of proven global strategic management consulting experience

**Industries Served**
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