

## **Clay Market Size, Share and Growth Analysis Report - Forecast Trends and Outlook (2025-2034)**

Market Report | 2025-07-15 | 176 pages | EMR Inc.

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### **Report description:**

The global clay market was valued at USD 28.30 Billion in 2024. The industry is expected to grow at a CAGR of 4.20% during the forecast period of 2025-2034 to attain a valuation of USD 42.70 Billion by 2034.

Clay is a sticky, moist, and heavy earthy material which is used to make tiles, bricks, and pots, among other materials. A form of natural soil material which is fine-grained, clay is composed of a blend of hydrous aluminium silicates with other types of minerals. Clay is formed by the chemical weathering of silicate-bearing rocks or by the decomposing process of feldspars.

It is a key component in the creation of ceramic objects and has been used for thousands of years in various cultures for making pottery, bricks, and sculptures. The composition and characteristics of clay can vary significantly depending on its source.

Primary clays also known as kaolin are formed where they are found, usually near the site of granite decomposition. They are relatively pure and free from impurities, whereas the secondary clays have been transported from their original location by water or wind, picking up other minerals and impurities along the way. Common examples of secondary clay include ball clays and stoneware clays.

### **Key Trends in the Market**

Growing demand for clay in the building and construction sector

The clay market trends include the rising applications of clay in the building and construction sector to manufacture critical construction components such as facades, roof tiles, bricks, blocks, and pavers, among others. Rapid urbanisation across emerging economies, rising standards of living, and rising population are contributing to the increased demand for building and construction.

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Clay is the primary material used in the production of traditional bricks. Its durability and thermal properties make it ideal for construction. Clay roofing tiles are preferred for their aesthetics, durability, and ability to withstand harsh weather conditions. They are also energy-efficient, helping to maintain a stable indoor temperature.

Moreover, products like hollow clay slabs are used in floor and roof construction. They are lightweight, strong, and have good insulation properties. Bentonite, a type of clay, is used for waterproofing and sealing in construction due to its swelling properties and impermeability when wet.

#### Surging applications of clay in the industrial sector

Rising demand for industrial clays, such as kaolin and bentonite, as filler sealants, and mud drillers, among other industrial components, is fuelling the clay market growth. Kaolin is also used as a coating material and filler in paper manufacturing. It improves the paper's brightness, smoothness, and printability.

Clay is essential in producing sanitary ceramics like toilets and basins, as well as in the tile market for both wall and floor tiles. Bentonite and Fuller's earth are used as catalysts in petroleum refining processes. In paints, clays serve as extenders to improve the paint's consistency, coverage, and colour properties. Furthermore, clay minerals, due to their absorptive and mineral properties, are ingredients in various skin care products, including masks and scrubs.

#### Research and development activities by market players

Growing efforts by local and international clay manufacturers to provide sustainable services with streamlined supply chains are expected to expand the reach of the market, leading to a greater product accessibility, and propelling the clay market demand in the forecast period. Manufacturers are increasingly sourcing clay from environmentally responsible locations. This involves minimising the impact of extraction on the local environment and ensuring that the sources are renewable or managed in a way that does not deplete natural resources.

The production of clay products, especially ceramics, typically requires significant energy, mainly for firing kilns. Manufacturers are investing in more energy-efficient kilns and exploring alternative energy sources, such as solar or wind power, to reduce their carbon footprint.

Additionally, the clay manufacturing process can be water-intensive and generate waste. Companies are implementing more efficient water use strategies and recycling processes to minimise waste. This includes reusing water in the production process and ensuring that any waste products are disposed of in an environmentally friendly manner.

#### The burgeoning popularity of 3D printing in clay

Over the forecast period, the 3D printing of clay is anticipated to become a part of traditional ceramic manufacturing processes, which is likely to provide lucrative opportunities for collaboration to provide innovative and quick clay products to consumers.

3D printing allows for the creation of complex, intricate designs in clay that would be difficult or impossible to achieve with traditional handcrafting methods. This capability has opened up new possibilities for artists and designers, enabling them to experiment with forms and structures that were previously unattainable.

The technology also lends itself well to customisation, allowing for the production of unique, one-of-a-kind clay items or small runs of customised products. This aspect is particularly appealing in markets like bespoke homeware, personalised pottery, and

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artisanal crafts. Moreover, for small businesses and individual artisans, 3D printing in clay offers a cost-effective way to produce high-quality, intricate designs without needing extensive infrastructure.

#### Global Clay Market Segmentation

Based on application, the market is segmented into sanitary ware, tableware, adhesives and sealants, fertilisers, bricks, and plastic and rubber, among others. The market segmentation, on the basis of end use, includes ceramic and non-ceramic. The regional markets for clay are North America, Europe, the Asia Pacific, Latin America, and the Middle East and Africa.

The comprehensive EMR report provides an in-depth assessment of the market based on the Porter's five forces model along with giving a SWOT analysis. The report gives a detailed analysis of the key players in the global clay market, covering their competitive landscape and latest developments like mergers, acquisitions, investments and expansion plans.

- Imerys S.A.
- Modkha Marine Sdn Bhd
- Stephan Schmidt Group
- Sibelco
- Jaichand Lal Daga Group
- Old Hickory Clay Company
- Gujarat Mineral Development Corporation Ltd
- MOTA Ceramic Solutions
- Associated Soapstone Distribution Company Pvt. Ltd.
- Others

#### Global Clay Market Share by Application

Adhesives and sealants applications account for a healthy portion of the market, as clay adhesives and sealants can battle wet conditions and keep structures intact during leakage or heavy rains. In addition, clay adhesives possess high solid content which makes them ideal for making heavyweight wall coverings and veneers. Clay sealants are also witnessing a heightened application in varnish coatings, which is further augmenting the segment's growth.

Clays, particularly those like bentonite, are used to modify the rheological properties of adhesives and sealants. They act as thickeners, increasing the viscosity of the product. This is crucial for controlling the flow and spread of the adhesive or sealant during application. Certain types of clays can enhance the adhesive properties of a formulation. They provide additional bonding strength, improving the adhesion to various substrates.

Clays are hygroscopic, meaning they can absorb and retain moisture. This property is useful in applications where moisture control is necessary, such as in sealants used in damp environments or in adhesives where moisture curing is part of the process.

#### Global Clay Market Analysis based on End Use

Based on end use, the ceramic segment occupies a significant share of the overall market, as the drying and moulding properties of clay make them applicable in the ceramics sector. Ceramics are witnessing a heightened demand in various verticals such as aerospace, construction, healthcare, MedTech, and automotive, among others.

Clay's plasticity allows it to be easily shaped and moulded. This quality is essential for creating various forms in pottery and sculpture. Artisans and manufacturers can hand-build, throw on a potter's wheel, or use moulds to create diverse shapes ranging

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from simple cups to complex figurative sculptures.

Meanwhile, non-ceramic end uses are expected to witness steady growth in the forecast period, due to the increasing application of kaolin, a type of clay used to produce non-ceramic materials to develop papers and plastics.

Clays are used to improve soil quality in the agricultural sector. They can help in water retention in sandy soils and make heavy soils more workable. Bentonite clay, in particular, is known for its ability to retain water and nutrients, benefiting plant growth. In the health and beauty sector, various types of clay are used in products like face masks, body wraps, soaps, and toothpaste. Clays such as kaolin, bentonite, and rhassoul are valued for their absorbent properties, which help in removing impurities and excess oil from the skin and hair.

#### Competitive Landscape

##### Imerys S.A.

Imerys S.A. is a multinational company which produces and processes mineral-based solutions include kaolin, carbonates, mica, clays, abrasives, graphite powders, and talc, among others. It was established in 1880 and is currently headquartered in Paris, France.

##### Modkha Marine Sdn Bhd

Modkha Marine Sdn Bhd is a global supplier of high-quality ball clay/plastic clay, catering to the demands of ceramics, tiles, porcelain, and paint and cosmetics market. The company was founded in 2012 and is headquartered in Cyberjaya, Malaysia.

##### Stephan Schmidt Group

Stephan Schmidt Group is one of the leading suppliers of specialised clays for various ceramic production purposes, and a prominent producer of ceramics, refractories, fillers, special-purpose building materials, and horticulture products. The company was established in 1947 and is currently based out of Kamenz-Wiesa, Germany.

Other clay manufacturers include Sibelco, Jaichand Lal Daga Group, Old Hickory Clay Company, Gujarat Mineral Development Corporation Ltd, MOTA Ceramic Solutions, and Associated Soapstone Distribution Company Pvt. Ltd., among others.

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