

TABLE OF CONTENTS

| | PAGE |
|---|-------------|
| 1 INTRODUCTION | 1 |
| 2 SCOPE | 6 |
| 3 TECHNOLOGY TRENDS | 8 |
| 3.1 Abrasive materials production | 8 |
| 3.1.1 Fused aluminium oxide and related materials | 8 |
| 3.1.1.1 Brown and white fused aluminium oxide | 9 |
| 3.1.1.2 Aluminium oxide-zirconia | 12 |
| 3.1.2 Microcrystalline aluminium oxide | 13 |
| 3.1.3 Other aluminium oxide | 15 |
| 3.1.3.1 Calcined bauxite | 15 |
| 3.1.3.2 Calcined aluminium oxide | 16 |
| 3.1.3.3 Ultra high-purity aluminium oxide powders | 16 |
| 3.1.3.4 Pyrogenic aluminium oxide | 17 |
| 3.1.3.5 Aluminium hydroxide | 17 |
| 3.1.4 Silicon carbide | 17 |
| 3.1.5 Diamond | 18 |
| 3.1.5.1 High pressure synthesis | 20 |
| 3.1.5.2 Dynamic (shock wave) production methods | 21 |
| 3.1.5.3 Diamond and similar materials produced by vapour deposition | 22 |
| 3.1.6 Cubic boron nitride (CBN) | 22 |
| 3.1.7 Cerium oxide | 24 |
| 3.1.8 Natural mineral abrasives extraction | 24 |
| 3.1.8.1 Emery | 24 |
| 3.1.8.2 Garnet | 25 |
| 3.1.8.3 Olivine | 26 |
| 3.1.8.4 Pumice | 27 |
| 3.1.9 Silica | 28 |
| 3.1.10 Boron carbide | 28 |
| 3.2 Abrasive materials properties and standards | 29 |
| 3.2.1 Hardness | 29 |
| 3.2.1.1 Alternative measures of hardness | 30 |
| 3.2.1.2 The limits of hardness | 30 |
| 3.2.2 Friability and strength | 31 |
| 3.2.3 Other properties | 33 |
| 3.2.4 Grit size and standards | 33 |
| 3.3 Recent developments in superhard materials | 35 |
| 3.4 Bonded abrasives | 39 |
| 3.4.1 Bond types | 39 |
| 3.4.1.1 Resin and elastomeric bonds | 39 |
| 3.4.1.2 Vitrified bonds | 40 |
| 3.4.1.3 Metallic bonds | 41 |
| 3.4.1.4 Other bonds | 43 |
| 3.4.2 Properties of bonded abrasives | 44 |
| 3.4.3 Dressing and truing | 44 |
| 3.4.4 Applications of bonded abrasives | 45 |
| 3.4.4.1 Pulpstone wheels | 46 |
| 3.4.5 Coolants and lubricants | 46 |
| 3.5 Coated abrasives | 47 |
| 3.5.1 Backing materials and adhesives | 47 |

| | | |
|----------|---|----|
| 3.5.2 | Properties of coated abrasives | 49 |
| 3.5.3 | Structured or engineered coated abrasives | 50 |
| 3.6 | Loose abrasives..... | 51 |
| 3.6.1 | Metallic abrasives..... | 51 |
| 3.6.1.1 | Steel shot..... | 51 |
| 3.6.1.2 | Cast iron shot and grit..... | 52 |
| 3.6.1.3 | Cut wire and other metallic abrasives | 52 |
| 3.6.1.4 | Performance and properties..... | 52 |
| 3.6.2 | Other loose abrasives | 53 |
| 3.6.2.1 | Glass beads..... | 53 |
| 3.6.2.2 | Glass grit | 53 |
| 3.6.2.3 | Ceramic beads..... | 54 |
| 3.6.2.4 | Slag | 55 |
| 3.6.2.5 | Sodium bicarbonate blasting..... | 55 |
| 3.6.2.6 | Plastics | 55 |
| 3.6.2.7 | Natural organic materials | 56 |
| 3.6.2.8 | Dry ice | 56 |
| 3.6.2.9 | Calcium carbonate..... | 56 |
| 3.7 | Health and safety aspects..... | 57 |
| 3.7.1 | Airborne silica dust..... | 57 |
| 3.7.2 | Other health and safety aspects..... | 58 |
| 3.7.2.1 | Coolants | 59 |
| 3.7.2.2 | Noise | 59 |
| 3.7.2.3 | Other areas..... | 60 |
| 3.8 | Recent developments in abrasive products..... | 61 |
| 3.8.1 | Research and development projects | 62 |
| 3.9 | Abrasive techniques and methods | 63 |
| 3.9.1 | Grinding methods..... | 63 |
| 3.9.1.1 | Standard grinding processes | 64 |
| 3.9.1.2 | Creep feed grinding | 66 |
| 3.9.1.3 | Centreless grinding..... | 67 |
| 3.9.1.4 | Grinding of ceramics..... | 67 |
| 3.9.1.5 | Other unusual grinding techniques..... | 67 |
| 3.9.2 | Abrasive blasting..... | 68 |
| 3.9.2.1 | Thermo blast technology..... | 71 |
| 3.9.3 | Shot peening..... | 71 |
| 3.9.4 | Water-jet cutting and cleaning..... | 72 |
| 3.9.5 | Coated abrasive methods..... | 73 |
| 3.9.6 | Tumbling, vibrating and other mass media finishing techniques | 74 |
| 3.9.7 | Polishing and lapping | 76 |
| 3.9.7.1 | Magnetorheological finishing (MRF)..... | 78 |
| 3.9.7.2 | Chemo-mechanical planarisation (CMP)..... | 78 |
| 3.9.8 | Wire sawing and stone cutting..... | 82 |
| 3.9.9 | Brushes..... | 86 |
| 3.9.10 | Non-woven abrasives | 86 |
| 3.9.11 | Abrasive foams | 86 |
| 3.9.12 | Grinding mill processes and media..... | 87 |
| 3.9.12.1 | Ball milling | 87 |
| 3.9.12.2 | Vibration milling | 87 |
| 3.9.12.3 | Attrition milling | 87 |
| 3.9.12.4 | Milling media..... | 88 |
| 3.9.13 | Grinding and chemical reactions | 90 |

| | |
|--|------------|
| 4 PRODUCTION AND MARKETS FOR ABRASIVE GRAINS | 91 |
| 4.1 Aluminium oxide | 91 |
| 4.1.1 Abrasive grade bauxite..... | 91 |
| 4.1.2 Fused aluminium oxide | 94 |
| 4.1.3 Microcrystalline aluminium oxide | 99 |
| 4.1.4 Other aluminium oxide-based abrasives..... | 99 |
| 4.2 Silicon carbide | 109 |
| 4.3 Superabrasives..... | 123 |
| 4.3.1 Industrial diamond..... | 123 |
| 4.3.1.1 Diamond pellets..... | 132 |
| 4.3.2 Cubic boron nitride (CBN) | 132 |
| 4.3.3 Superabrasive products – consumption and future growth | 134 |
| 4.4 Natural abrasives..... | 135 |
| 4.4.1 Silica sand..... | 135 |
| 4.4.2 Emery..... | 135 |
| 4.4.3 Pumice | 135 |
| 4.4.4 Garnet..... | 136 |
| 4.4.5 Olivine..... | 137 |
| | |
| 5 PRODUCTION AND MARKETS FOR ABRASIVE PRODUCTS..... | 139 |
| 5.1 General economic indicators and comparisons..... | 139 |
| 5.2 Growth trends in various user sectors..... | 145 |
| 5.2.1 Construction Industry | 145 |
| 5.2.2 Stoneworking | 147 |
| 5.2.3 Mechanical engineering | 149 |
| 5.2.4 Semiconductors | 152 |
| 5.2.5 Solar energy..... | 153 |
| 5.3 Abrasive products in the European Union (EU)..... | 155 |
| 5.3.1 Bonded abrasives markets..... | 170 |
| 5.3.2 Coated abrasives markets..... | 171 |
| 5.3.3 Blasting media markets | 172 |
| 5.3.3.3 Metallic abrasives markets..... | 174 |
| 5.3.4 Other abrasive products | 175 |
| 5.4 Germany..... | 198 |
| 5.5 France | 204 |
| 5.6 Italy..... | 207 |
| 5.7 United Kingdom | 211 |
| 5.8 Spain | 215 |
| 5.9 Scandinavia | 218 |
| 5.10 Benelux | 228 |
| 5.11 Other West European Countries | 233 |
| 5.12 East European Countries..... | 245 |
| 5.13 Turkey | 260 |
| 5.14 Japan..... | 263 |
| 5.15 India..... | 267 |
| 5.16 Brazil | 270 |
| 5.17 South Africa | 273 |
| | |
| 6 NORTH AMERICA | 276 |
| 6.1 Introduction..... | 276 |
| 6.1.1 Trade balances | 277 |
| 6.1.1.1 International trade in abrasive products | 277 |
| 6.1.2 Industry concentration | 283 |
| 6.1.3 Market analysis | 284 |

| | | |
|-----------|--|-----|
| 6.1.4 | Industry segments | 286 |
| 6.1.5 | Key trends | 289 |
| 6.1.6 | Key US players | 290 |
| 6.1.7 | Trends in research | 292 |
| 6.1.8 | Environmental issues | 293 |
| 6.1.9 | Classification and definition | 294 |
| 6.2 | Synthetic minerals | 295 |
| 6.2.1 | Aluminium oxide | 295 |
| 6.2.1.1 | Sol gel aluminium oxide abrasives | 299 |
| 6.2.1.2 | Chinese issues | 300 |
| 6.2.2 | Silicon carbide | 301 |
| 6.2.3 | Leading US companies – synthetic minerals | 308 |
| 6.2.4 | Superabrasive materials | 315 |
| 6.2.4.1 | Diamond | 316 |
| 6.2.4.1.1 | Industrial diamond – technology trends | 321 |
| 6.2.4.2 | Cubic boron nitride (CBN) | 322 |
| 6.2.4.3 | Leading US companies – superabrasives | 322 |
| 6.3 | Natural minerals | 324 |
| 6.3.1 | Corundum | 324 |
| 6.3.2 | Natural industrial diamond | 324 |
| 6.3.2.1 | Import and export of natural industrial diamond | 325 |
| 6.3.3 | Garnet | 331 |
| 6.3.3.1 | Markets for garnet | 333 |
| 6.3.3.2 | Leading US companies – garnet | 334 |
| 6.3.4 | Silica | 334 |
| 6.3.4.1 | Quartz | 334 |
| 6.3.4.2 | Siliceous powder | 335 |
| 6.3.4.3 | Novaculite | 335 |
| 6.3.4.4 | Sand | 335 |
| 6.3.4.5 | Leading US companies – silica | 337 |
| 6.3.5 | Tripoli | 337 |
| 6.3.5.1 | Production of tripoli | 338 |
| 6.3.5.2 | Leading US companies – tripoli | 338 |
| 6.3.6 | Trends in synthetic minerals | 339 |
| 6.4 | Bonded abrasive products | 341 |
| 6.4.1 | Export and import of bonded abrasives | 342 |
| 6.4.2 | Conventional grinding wheels | 344 |
| 6.4.3 | Diamond and CBN grinding wheels | 345 |
| 6.4.4 | Leading US companies – bonded products | 347 |
| 6.4.4.1 | Leading US companies – superabrasive bonded products | 350 |
| 6.4.5 | Business trends and product innovations | 352 |
| 6.4.6 | Research | 354 |
| 6.4.7 | Patents | 356 |
| 6.5 | Coated abrasive products | 358 |
| 6.5.1 | Markets for coated abrasive | 360 |
| 6.5.1.1 | Exports and imports of coated abrasives | 361 |
| 6.5.1.2 | Fabric backed abrasive belts | 361 |
| 6.5.2 | Leading US companies – coated abrasives | 369 |
| 6.5.3 | Patents | 375 |
| 6.6 | Loose abrasives | 377 |
| 6.6.1 | Abrasive blasting | 377 |
| 6.6.1.1 | Microblasting | 378 |
| 6.6.2 | Silica | 379 |
| 6.6.3 | Coal slag | 379 |
| 6.6.4 | Boron carbide | 379 |

| | | |
|----------|---|------------|
| 6.6.5 | Metal abrasives | 379 |
| 6.6.5.1 | Production of metal abrasives | 380 |
| 6.6.5.2 | Metal abrasives price | 381 |
| 6.6.5.3 | International trade in metal abrasives | 382 |
| 6.6.6 | Trends in loose abrasives..... | 384 |
| 6.6.7 | Leading US companies – loose abrasives | 384 |
| 6.7 | CMP – chemical mechanical planarisation / chemical mechanical polishing | 389 |
| 6.7.1 | Leading US companies – CMP | 393 |
| 6.8 | Wholesalers and distributors..... | 396 |
| 6.8.1 | Market status..... | 396 |
| 6.9 | US abrasives industry – summary and conclusions | 398 |
| 6.9.1 | End user markets | 398 |
| 6.10 | Canadian abrasives industry..... | 402 |
| 6.10.1 | Leading Canadian companies | 408 |
| 6.11 | Mexico | 411 |
| 6.11.1 | Leading Mexican companies | 423 |
| 6.12 | China | 424 |
| 6.12.1 | Recent changes | 429 |
| 6.12.2 | Leading Chinese companies | 435 |
| 7 | COMPANY PROFILES..... | 454 |
| 8 | SUMMARY AND CONCLUSIONS | 494 |
| 9 | APPENDICES | 501 |
| 9.1 | Currency exchange rates..... | 501 |
| 9.2 | Subsidiaries cross reference..... | 502 |
| 9.3 | Company addresses..... | 504 |
| 9.4 | National associations..... | 518 |
| 9.5 | Literature references..... | 520 |
| 9.6 | Glossary | 524 |
| 9.7 | Multilingual listing of abrasives terms..... | 527 |
| 9.8 | Abbreviations..... | 530 |

TABLES

| | |
|--|----|
| Table 3.1: Typical chemical analyses of abrasive-grade calcined bauxite (%) | 8 |
| Table 3.2: Composition of typical commercial fused aluminium oxide grains (%)..... | 10 |
| Table 3.3: Composition and properties of fused aluminium oxide abrasives | 11 |
| Table 3.4: Non-metallurgical aluminium oxide production by continent/region, 2002 and 2008 (thousand tonnes)..... | 12 |
| Table 3.5: Composition and properties of fused aluminium oxide-zirconia abrasives..... | 13 |
| Table 3.6: Properties of microcrystalline aluminium oxide abrasive grains..... | 14 |
| Table 3.7: Description of various microcrystalline abrasives | 14 |
| Table 3.8: Properties of fine aluminium oxide lapping materials..... | 16 |
| Table 3.9: Characteristics of single crystal natural diamond..... | 19 |
| Table 3.10: Mechanical properties of three types of bond for diamond grinding wheels..... | 19 |
| Table 3.11: Garnet compositions and hardness..... | 25 |
| Table 3.12: Composition and physical properties of typical Norwegian olivine..... | 26 |
| Table 3.13: Mohs hardness of synthetic and natural abrasive materials | 29 |
| Table 3.14: Knoop hardness of abrasive materials | 30 |
| Table 3.15: Hardness and relative friability of aluminium oxide and silicon carbide abrasive grains | 31 |
| Table 3.16: Strength of individual abrasive particles | 32 |
| Table 3.17: Physical properties of different types of CBN | 32 |
| Table 3.18: Typical properties of the five main types of abrasives | 33 |
| Table 3.19: FEPA series of microgrit sizings: F series | 34 |
| Table 3.20: FEPA-standard 42-1984 R 1993: macrogrit sizes for grinding wheels and other bonded abrasives | 34 |
| Table 3.21: International abrasive standard size comparisons for coated abrasives | 35 |
| Table 3.22: Approximate relationship between FEPA and other national diamond and CBN grit size designations..... | 36 |
| Table 3.23: Dressability and wear resistance of various types of bonded CBN wheels..... | 45 |
| Table 3.24: Typical recommended grinding speeds (surface velocity) for a range of materials, using aluminium oxide or silicon carbide bonded abrasives | 45 |
| Table 3.25: Application ranges of various types of bond for coated abrasives | 48 |
| Table 3.26: Typical speeds for coated abrasive belts in finishing various metals | 49 |
| Table 3.27: Comparison of abrasive grains used in blast cleaning..... | 51 |
| Table 3.28: Example of steel shot specification | 53 |
| Table 3.29: Properties of glass | 54 |
| Table 3.30: Properties and specifications of <i>Zirblast</i> fused ceramic beads | 54 |
| Table 3.31: Properties of resin blast media..... | 56 |
| Table 3.32: USA: health and safety limits for crystalline silica..... | 58 |
| Table 3.33: Types of materials suitable for grinding with conventional abrasives and superabrasives | 63 |
| Table 3.34: Parameters for carbide grinding by diamond wheels..... | 65 |
| Table 3.35: Relative durability of blast media..... | 70 |
| Table 3.36: Relative costs and performance of blasting nozzles..... | 70 |
| Table 3.37: Water-jet cutting market by application area (%)..... | 72 |
| Table 3.38: Properties of sapphire versus monocrystalline synthetic diamond for use as water jet abrasive nozzles | 73 |
| Table 3.39: Relative rates of material removal in coated belt grinding | 74 |
| Table 3.40: Mass finishing selection parameters | 75 |
| Table 3.41: Quantity of abrasive media recommended for mass media techniques..... | 75 |
| Table 3.42: Examples of abrasive slurries used in CMP of semiconductor integrated circuits | 79 |
| Table 3.43: Low dielectric constant (k) materials for circuit fabrication..... | 82 |
| Table 3.44: Comparison of stone cutting techniques | 83 |

| | |
|--|-----|
| Table 3.45: Comparison between waste materials produced by two methods of sawing granites..... | 83 |
| Table 3.46: Sales of multi diamond wire sawing machines with from 2-29 wires, 2006..... | 84 |
| Table 3.47: Main uses of natural stone worldwide | 85 |
| Table 3.48: Comparative typical property and wear rate chart for milling media..... | 89 |
| Table 4.1: Production of bauxite by country, 2001-2008 (thousand tonnes)..... | 91 |
| Table 4.2: Main producers of abrasive grade bauxite..... | 93 |
| Table 4.3: A comparison between Nanchuan and Henan abrasive bauxite..... | 93 |
| Table 4.4: Aluminium oxide production for non-metallurgical applications, 2001-2008 (thousands of tonnes) | 94 |
| Table 4.5: World production capacity of fused aluminium oxide by country, 2001-2008 (tonnes) | 95 |
| Table 4.6: Major world producers of fused aluminium oxide (excluding China), 2008 | 95 |
| Table 4.7: Fused aluminium oxide production, 2008 (tonnes) | 97 |
| Table 4.8: Europe (EU): market share of fused aluminium oxide abrasive grains by producer, 2008 (% by weight) | 99 |
| Table 4.9: EU Countries: Imports of artificial corundum, 2008 (Euros) (Part 1) | 100 |
| Table 4.10: EU Countries: Imports of artificial corundum, 2008 (Euros) (Part 2) | 101 |
| Table 4.11: EU Countries: Imports of artificial corundum, 2008 (100 kg) (Part 1)..... | 102 |
| Table 4.12: EU Countries: Imports of artificial corundum, 2008 (100 kg) (Part 2)..... | 103 |
| Table 4.13: EU Countries: Exports of artificial corundum, 2008 (Euros) (Part 1) | 104 |
| Table 4.14: EU Countries: Exports of artificial corundum, 2008 (Euros) (Part 2) | 106 |
| Table 4.15: EU Countries: Exports of artificial corundum, 2008 (100 kg) (Part 1)..... | 107 |
| Table 4.16: EU Countries: Exports of artificial corundum, 2008 (100 kg) (Part 2)..... | 108 |
| Table 4.17: World production capacity of silicon carbide by country, 2004-2008 (tonnes) | 109 |
| Table 4.18: Europe: silicon carbide capacity by producer, 2008 (tonnes)..... | 109 |
| Table 4.19: America, Africa and the Middle East: silicon carbide capacity by producer, 2008 (tonnes) | 112 |
| Table 4.20: Western Europe: price trends for silicon carbide abrasive grains, 1996-2008 (US\$) | 112 |
| Table 4.21: Europe: market share of silicon carbide abrasive grain by producer, 2008..... | 113 |
| Table 4.22: EU Countries: Imports of silicon carbide, 2008 (Euros) (Part 1) | 114 |
| Table 4.23: EU Countries: Imports of silicon carbide, 2008 (Euros) (Part 2) | 115 |
| Table 4.24: EU Countries: Imports of silicon carbide, 2008 (100 kg) (Part 1) | 116 |
| Table 4.25: EU Countries: Imports of silicon carbide, 2008 (100 kg) (Part 2) | 117 |
| Table 4.26: EU Countries: Exports of silicon carbide, 2008 (Euros) (Part 1) | 118 |
| Table 4.27: EU Countries: Exports of silicon carbide, 2008 (Euros) (Part 2) | 120 |
| Table 4.28: EU Countries: Exports of silicon carbide, 2008 (100 kg) (Part 1)..... | 121 |
| Table 4.29: EU Countries: Exports of silicon carbide, 2008 (100 kg) (Part 2)..... | 122 |
| Table 4.30: USA: prices of diamond imports, 2000-2008 (\$ per carat)..... | 123 |
| Table 4.31: Synthetic diamond production capacity by major country, 1997-2008 (million carats) | 124 |
| Table 4.32: Production of natural industrial diamond by major country, 1998-2008 (thousand carats ¹) | 125 |
| Table 4.33: EU Countries: Imports of industrial diamonds, 2008 (Euros) (Part 1) | 126 |
| Table 4.34: EU Countries: Imports of industrial diamonds, 2008 (Euros) (Part 2) | 127 |
| Table 4.35: EU Countries: Imports of industrial diamonds, 2008 (100 kg) (Part 1)..... | 127 |
| Table 4.36: EU Countries: Imports of industrial diamonds, 2008 (100 kg) (Part 2)..... | 127 |
| Table 4.37: EU Countries: Exports of industrial diamonds, 2008 (Euros) (Part 1) | 128 |
| Table 4.38: EU Countries: Exports of industrial diamonds, 2008 (Euros) (Part 2) | 129 |
| Table 4.39: EU Countries: Exports of industrial diamonds, 2008 (100 kg) (Part 1)..... | 129 |
| Table 4.40: EU Countries: Exports of industrial diamonds, 2008 (100 kg) (Part 2)..... | 129 |
| Table 4.41: Applications of diamond abrasives in the glass industry..... | 130 |
| Table 4.42 Global diamond tool demand by end user industry by value, 2007 (%) | 131 |

| | |
|---|-----|
| Table 4.43: World: diamond tools in stone and construction by product type and value, 2007 (%) | 131 |
| Table 4.44: Europe: diamond saw tool market by country (%) | 131 |
| Table 4.45: Europe: trends in the bond types used in CBN wheels, 1998-2008 (%) | 133 |
| Table 4.46: World: suppliers of CBN grit (excluding China and Russia), 2008 (%)..... | 133 |
| Table 4.47: Europe (EU): suppliers of CBN grit, 2008 (%) | 133 |
| Table 4.48: Comparative cost/benefit profile for vitrified aluminium oxide and ceramic-bonded CBN grinding wheels..... | 134 |
| Table 4.49: World production of pumice, 2001-2008 (thousand tonnes) | 136 |
| Table 4.50: Worldwide garnet production and reserves by geographical region, 2001-2008 (tonnes) | 137 |
| Table 4.51: Garnet abrasive markets by geographical region (tonnes) | 137 |
| Table 4.52: World: olivine production 2004, 2008 (weight)..... | 138 |
| Table 5.1: GDP by country, 2008 (US\$ million)..... | 142 |
| Table 5.2: European Countries: real GDP growth and CPI inflation, 2007-2010 | 143 |
| Table 5.3: World economic projections, by output, as of July 2009 (% change)..... | 145 |
| Table 5.4: Europe: total construction output 2005 and 2008 (billions of Euros)..... | 146 |
| Table 5.5: Europe: construction output forecast by sector, 2003-2009 (%) | 146 |
| Table 5.6: Europe: construction output shrinkage forecast by country, 2009 (%) | 147 |
| Table 5.7: EU countries: Production of worked granite and marble stone, 2007-2008 (€ million) | 148 |
| Table 5.8: USA: stone imports from major source countries, 2008..... | 148 |
| Table 5.9: Worldwide production ¹ of machine tools, 2001, 2004, 2007 and 2008 (€ million)..... | 147 |
| Table 5.10: Worldwide consumption of machine tools, 2004, 2007 and 2008 (€ million)..... | 150 |
| Table 5.11: Motor vehicle production in Europe by country, 2004-2008..... | 150 |
| Table 5.12: World production of motor vehicles by region, 2007 (%) | 151 |
| Table 5.13: Worldwide semiconductor market growth by region, 2007-2010 (\$ million) | 152 |
| Table 5.14: Evolution of worldwide demand for CMP slurries and pads, 2006-2010 (\$ million) | 153 |
| Table 5.15: Photovoltaic market demand by country, 2008..... | 153 |
| Table 5.16: Global annual polysilicon photovoltaic market outlook 2008-13 (GW) | 154 |
| Table 5.17: Roadmap for developments in wafer thickness and kerf loss, 2005-2020 | 155 |
| Table 5.18: Europe (EU): production of abrasive products by major categories, 2004-2008 (€ million)..... | 155 |
| Table 5.19: Europe (EU 27): bonded abrasive products trade by country, 2008 (thousand tonnes)..... | 156 |
| Table 5.20: Europe (EU 27): bonded abrasive products trade by country, 2008 (€ million) | 157 |
| Table 5.21: Europe (EU 27): coated abrasive products trade by country, 2008 (thousand tonnes)..... | 157 |
| Table 5.22: Europe (EU 27): coated abrasive products trade by country, 2008 (€ million) | 158 |
| Table 5.23: Europe (EU 27): imports of bonded abrasives, 2008..... | 159 |
| Table 5.24: Europe (EU 27): exports of bonded abrasives, 2008..... | 161 |
| Table 5.25: Europe (EU 27): imports of coated abrasives, 2008 | 165 |
| Table 5.26: Europe (EU 27): exports of coated abrasives, 2008 | 167 |
| Table 5.27: Europe (EU): market shares of suppliers of bonded abrasives (excluding superabrasives), 2008 (€ million and percentage) | 171 |
| Table 5.28: Europe (EU): market shares of suppliers of coated abrasives, 2008 (€ million and percentage) | 172 |
| Table 5.29: Europe (EU): consumption and prices of abrasive blasting media, 2008..... | 173 |
| Table 5.30: Europe (EU): producers of steel shot and grit by production and capacity, 2008 (tonnes) | 175 |
| Table 5.31: Demand for rare earth oxides for polishing by region, 2008 (tonnes) | 176 |
| Table 5.32: EU countries: imports of bonded abrasives, 2008 (Euros) (Part 1)..... | 177 |

| | |
|---|-----|
| Table 5.33: EU countries: imports of bonded abrasives, 2008 (Euros) (Part 2)..... | 178 |
| Table 5.34: EU countries: imports of bonded abrasives, 2008 (100 kg) (Part 1)..... | 179 |
| Table 5.35: EU countries: imports of bonded abrasives, 2008 (100 kg) (Part 2)..... | 180 |
| Table 5.36: EU countries: exports of bonded abrasives, 2008 (Euros) (Part 1)..... | 181 |
| Table 5.37: EU countries: exports of bonded abrasives, 2008 (Euros) (Part 2)..... | 183 |
| Table 5.38: EU countries: exports of bonded abrasives, 2008 (100 kg) (Part 1)..... | 185 |
| Table 5.39: EU countries: exports of bonded abrasives, 2008 (100 kg) (Part 2)..... | 186 |
| Table 5.40: EU countries: imports of coated abrasives, 2008 (Euros) (Part 1)..... | 187 |
| Table 5.41: EU countries: imports of coated abrasives, 2008 (Euros) (Part 2)..... | 188 |
| Table 5.42: EU countries: imports of coated abrasives, 2008 (100 kg) (Part 1)..... | 189 |
| Table 5.43: EU countries: imports of coated abrasives, 2008 (100 kg) (Part 2)..... | 190 |
| Table 5.44: EU countries: exports of coated abrasives, 2008 (Euros) (Part 1)..... | 191 |
| Table 5.45: EU countries: exports of coated abrasives, 2008 (Euros) (Part 2)..... | 193 |
| Table 5.46: EU countries: exports of coated abrasives, 2008 (100 kg) (Part 1)..... | 195 |
| Table 5.47: EU countries: exports of coated abrasives, 2008 (100 kg) (Part 2)..... | 197 |
| Table 5.48: Germany: production of abrasive products by major categories, 2001-2008 (€ million)..... | 198 |
| Table 5.49: Germany: production of abrasive products by major categories, 2001-2008 (thousand tonnes and thousand metres ²)..... | 199 |
| Table 5.50: Germany: manufacturing trends for the main categories of abrasive products, 1993-2008 (€ million)..... | 199 |
| Table 5.51: Germany: number of companies involved in manufacture of abrasive products by major categories, 1998-2008..... | 200 |
| Table 5.52: Germany: machine tool production and trade 2001, 2004, 2007 and 2008 (€ million)..... | 201 |
| Table 5.53: Germany: exports of bonded abrasives, 2008 (US\$ and kg)..... | 202 |
| Table 5.54: Germany: imports of bonded abrasives, 2008 (US\$ and kg)..... | 202 |
| Table 5.55: Germany: exports of coated abrasives, 2008 (US\$ and kg)..... | 203 |
| Table 5.56: Germany: imports of coated abrasives, 2008 (US\$ and kg)..... | 203 |
| Table 5.57: France: production of abrasive products by major categories, 2001-2008 (€ million)..... | 204 |
| Table 5.58: France: exports of bonded abrasives, 2008 (US\$ and kg)..... | 205 |
| Table 5.59: France: imports of bonded abrasives, 2008 (US\$ and kg)..... | 205 |
| Table 5.60: France: exports of coated abrasives, 2008 (US\$ and kg)..... | 206 |
| Table 5.61: France: imports of coated abrasives, 2008 (US\$ and kg)..... | 206 |
| Table 5.62: Italy: production of abrasive products by major categories, 2001-2008 (€ million)..... | 207 |
| Table 5.63: Italy: production of porcelain stoneware tiles, 2000-2008 (millions of m ²)..... | 208 |
| Table 5.64: Italy: exports of bonded abrasives, 2008 (US\$ and kg)..... | 209 |
| Table 5.65: Italy: imports of bonded abrasives, 2008 (US\$ and kg)..... | 209 |
| Table 5.66: Italy: exports of coated abrasives, 2008 (US\$ and kg)..... | 210 |
| Table 5.67: Italy: imports of coated abrasives, 2008 (US\$ and kg)..... | 210 |
| Table 5.68: UK: manufacture of bonded and coated abrasive products by major categories, 1998-2005 (UK manufacturers' sales)..... | 211 |
| Table 5.69: UK: production of abrasive products by major categories, 2001-2008 (€ million)..... | 212 |
| Table 5.70: UK: exports of bonded abrasives, 2008 (US\$ and kg)..... | 213 |
| Table 5.71: UK: imports of bonded abrasives, 2008 (US\$ and kg)..... | 213 |
| Table 5.72: UK: exports of coated abrasives, 2008 (US\$ and kg)..... | 214 |
| Table 5.73: UK: imports of coated abrasives, 2008 (US\$ and kg)..... | 214 |
| Table 5.74: Spain: production of abrasive products by major categories, 2001-2008 (€ million)..... | 215 |
| Table 5.75: Spain: exports of bonded abrasives, 2007 (US\$ and kg)..... | 216 |
| Table 5.76: Spain: imports of bonded abrasives, 2007 (US\$ and kg)..... | 216 |
| Table 5.77: Spain: exports of coated abrasives, 2007 (US\$ and kg)..... | 217 |

| | |
|--|-----|
| Table 5.78: Spain: imports of coated abrasives, 2007 (US\$ and kg)..... | 217 |
| Table 5.79: Finland: production of abrasive products by major categories, 2001-2008 (€ million) | 219 |
| Table 5.80: Denmark: exports of bonded abrasives, 2008 (US\$ and kg) | 220 |
| Table 5.81: Denmark: imports of bonded abrasives, 2008 (US\$ and kg) | 220 |
| Table 5.82: Denmark: exports of coated abrasives, 2008 (US\$ and kg)..... | 221 |
| Table 5.83: Denmark: imports of coated abrasives, 2008 (US\$ and kg)..... | 221 |
| Table 5.84: Finland: exports of bonded abrasives, 2008 (US\$ and kg) | 222 |
| Table 5.85: Finland: imports of bonded abrasives, 2008 (US\$ and kg) | 222 |
| Table 5.86: Finland: exports of coated abrasives, 2008 (US\$ and kg) | 223 |
| Table 5.87: Finland: imports of coated abrasives, 2008 (US\$ and kg) | 223 |
| Table 5.88: Norway: exports of bonded abrasives, 2008 (US\$ and kg)..... | 224 |
| Table 5.89: Norway: imports of bonded abrasives, 2008 (US\$ and kg)..... | 224 |
| Table 5.90: Norway: imports of coated abrasives, 2008 (US\$ and kg)..... | 225 |
| Table 5.91: Sweden: exports of bonded abrasives, 2008 (US\$ and kg)..... | 226 |
| Table 5.92: Sweden: imports of bonded abrasives, 2008 (US\$ and kg)..... | 226 |
| Table 5.93: Sweden: exports of coated abrasives, 2008 (US\$ and kg)..... | 227 |
| Table 5.94: Sweden: imports of coated abrasives, 2008 (US\$ and kg)..... | 227 |
| Table 5.95: Belgium: exports of bonded abrasives, 2008 (US\$ and kg)..... | 229 |
| Table 5.96: Belgium: imports of bonded abrasives, 2008 (US\$ and kg)..... | 229 |
| Table 5.97: Belgium: exports of coated abrasives, 2008 (US\$ and kg)..... | 230 |
| Table 5.98: Belgium: imports of coated abrasives, 2008 (US\$ and kg)..... | 230 |
| Table 5.99: Netherlands: exports of bonded abrasives, 2008 (US\$ and kg)..... | 231 |
| Table 5.100: Netherlands: imports of bonded abrasives, 2008 (US\$ and kg)..... | 231 |
| Table 5.101: Netherlands: exports of coated abrasives, 2008 (US\$ and kg)..... | 232 |
| Table 5.102: Netherlands: imports of coated abrasives, 2008 (US\$ and kg)..... | 232 |
| Table 5.103: Portugal: production of abrasive products by major categories, 2001-2008 (€ million) | 234 |
| Table 5.104: Austria: exports of bonded abrasives, 2008 (US\$ and kg)..... | 235 |
| Table 5.105: Austria: imports of bonded abrasives, 2008 (US\$ and kg)..... | 235 |
| Table 5.106: Austria: exports of coated abrasives, 2008 (US\$ and kg)..... | 236 |
| Table 5.107: Austria: imports of coated abrasives, 2008 (US\$ and kg)..... | 236 |
| Table 5.108: Greece: exports of bonded abrasives, 2008 (US\$ and kg) | 237 |
| Table 5.109: Greece: imports of bonded abrasives, 2008 (US\$ and kg) | 237 |
| Table 5.110: Greece: exports of coated abrasives, 2008 (US\$ and kg) | 238 |
| Table 5.111: Greece: imports of coated abrasives, 2008 (US\$ and kg) | 238 |
| Table 5.112: Ireland: exports of bonded abrasives, 2008 (US\$ and kg)..... | 239 |
| Table 5.113: Ireland: imports of bonded abrasives, 2008 (US\$ and kg)..... | 239 |
| Table 5.114: Ireland: exports of coated abrasives, 2008 (US\$ and kg)..... | 240 |
| Table 5.115: Ireland: imports of coated abrasives, 2008 (US\$ and kg)..... | 240 |
| Table 5.116: Portugal: exports of bonded abrasives, 2008 (US\$ and kg)..... | 241 |
| Table 5.117: Portugal: imports of bonded abrasives, 2008 (US\$ and kg)..... | 241 |
| Table 5.118: Portugal: exports of coated abrasives, 2008 (US\$ and kg)..... | 242 |
| Table 5.119: Portugal: imports of coated abrasives, 2008 (US\$ and kg)..... | 242 |
| Table 5.120: Switzerland: exports of bonded abrasives, 2008 (US\$ and kg) | 243 |
| Table 5.121: Switzerland: imports of bonded abrasives, 2008 (US\$ and kg) | 243 |
| Table 5.122: Switzerland: exports of coated abrasives, 2008 (US\$ and kg)..... | 244 |
| Table 5.123: Switzerland: imports of coated abrasives, 2008 (US\$ and kg)..... | 244 |
| Table 5.124: East European countries' population, 2008 (millions) | 245 |
| Table 5.125: Poland: production of abrasive products by major categories, 2004-2008 (€ million) | 247 |
| Table 5.126: Poland: exports of bonded abrasives, 2008 (US\$ and kg)..... | 248 |
| Table 5.127: Poland: imports of bonded abrasives, 2008 (US\$ and kg)..... | 248 |
| Table 5.128: Poland: exports of coated abrasives, 2008 (US\$ and kg)..... | 249 |
| Table 5.129: Poland: imports of coated abrasives, 2008 (US\$ and kg)..... | 249 |

| | |
|--|-----|
| Table 5.130: Russia: exports of bonded abrasives, 2008 (US\$ and kg)..... | 250 |
| Table 5.131: Russia: imports of bonded abrasives, 2008 (US\$ and kg)..... | 250 |
| Table 5.132: Russia: exports of coated abrasives, 2008 (US\$ and kg)..... | 251 |
| Table 5.133: Russia: imports of coated abrasives, 2008 (US\$ and kg)..... | 251 |
| Table 5.134: Hungary: exports of bonded abrasives, 2008 (US\$ and kg)..... | 252 |
| Table 5.135: Hungary: imports of bonded abrasives, 2008 (US\$ and kg)..... | 252 |
| Table 5.136: Hungary: exports of coated abrasives, 2008 (US\$ and kg)..... | 253 |
| Table 5.137: Hungary: imports of coated abrasives, 2008 (US\$ and kg)..... | 253 |
| Table 5.138: Czech Republic: exports of bonded abrasives, 2008 (US\$ and kg)..... | 254 |
| Table 5.139: Czech Republic: imports of bonded abrasives, 2008 (US\$ and kg)..... | 254 |
| Table 5.140: Czech Republic: exports of coated abrasives, 2008 (US\$ and kg)..... | 255 |
| Table 5.141: Czech Republic: imports of coated abrasives, 2008 (US\$ and kg)..... | 255 |
| Table 5.142: Slovakia: exports of bonded abrasives, 2008 (US\$ and kg)..... | 256 |
| Table 5.143: Slovakia: imports of bonded abrasives, 2008 (US\$ and kg)..... | 256 |
| Table 5.144: Slovakia: exports of coated abrasives, 2008 (US\$ and kg)..... | 257 |
| Table 5.145: Slovakia: imports of coated abrasives, 2008 (US\$ and kg)..... | 257 |
| Table 5.146: Slovenia: exports of bonded abrasives, 2008 (US\$ and kg)..... | 258 |
| Table 5.147: Slovenia: imports of bonded abrasives, 2008 (US\$ and kg)..... | 258 |
| Table 5.148: Slovenia: exports of coated abrasives, 2008 (US\$ and kg)..... | 259 |
| Table 5.149: Slovenia: imports of coated abrasives, 2008 (US\$ and kg)..... | 259 |
| Table 5.150: Turkey: exports of bonded abrasives, 2008 (US\$ and kg)..... | 261 |
| Table 5.151: Turkey: imports of bonded abrasives, 2008 (US\$ and kg)..... | 261 |
| Table 5.152: Turkey: exports of coated abrasives, 2008 (US\$ and kg)..... | 262 |
| Table 5.153: Turkey: imports of coated abrasives, 2008 (US\$ and kg)..... | 262 |
| Table 5.154: Japan: diamond and CBN tool production, 2001-2008 (millions of ¥)..... | 263 |
| Table 5.155: Production of diamond and CBN tools in Japan, May 2008 and May 2009..... | 263 |
| Table 5.156: Japan: exports of bonded abrasives, 2008 (US\$ and kg)..... | 265 |
| Table 5.157: Japan: imports of bonded abrasives, 2008 (US\$ and kg)..... | 265 |
| Table 5.158: Japan: exports of coated abrasives, 2008 (US\$ and kg)..... | 266 |
| Table 5.159: Japan: imports of coated abrasives, 2008 (US\$ and kg)..... | 266 |
| Table 5.160: India: exports of bonded abrasives, 2008 (US\$ and kg)..... | 268 |
| Table 5.161: India: imports of bonded abrasives, 2008 (US\$ and kg)..... | 268 |
| Table 5.162: India: exports of coated abrasives, 2008 (US\$ and kg)..... | 269 |
| Table 5.163: India: imports of coated abrasives, 2008 (US\$ and kg)..... | 269 |
| Table 5.164: Brazil: exports of bonded abrasives, 2008 (US\$ and kg)..... | 271 |
| Table 5.165: Brazil: imports of bonded abrasives, 2008 (US\$ and kg)..... | 271 |
| Table 5.166: Brazil: exports of coated abrasives, 2008 (US\$ and kg)..... | 272 |
| Table 5.167: Brazil: imports of coated abrasives, 2008 (US\$ and kg)..... | 272 |
| Table 5.168: South Africa: exports of bonded abrasives, 2008 (US\$ and kg)..... | 274 |
| Table 5.169: South Africa: imports of bonded abrasives, 2008 (US\$ and kg)..... | 274 |
| Table 5.170: South Africa: exports of coated abrasives, 2008 (US\$ and kg)..... | 275 |
| Table 5.171: South Africa: imports of coated abrasives, 2008 (US\$ and kg)..... | 275 |
| Table 6.1: USA: abrasives shipments by type, 2000-2008 (millions of \$)..... | 276 |
| Table 6.2: USA: trade balances for abrasive products, 2005-2008 (thousands of \$)..... | 278 |
| Table 6.3: USA: imports and exports of abrasive products, 2001-2008 (millions of \$)..... | 282 |
| Table 6.4: Changes in workforce numbers in the US abrasives industry, 2001-2007..... | 282 |
| Table 6.5: US States with concentrations of abrasive manufacturers..... | 283 |
| Table 6.6: Changes in US gross domestic product (GNP), 2002-2008 (billions of \$)..... | 284 |
| Table 6.7: Annual output of selected US manufacturing sectors, 1998-2007 (billions of \$)..... | 285 |
| Table 6.8: Number of abrasives establishments in the USA, 2001-2007..... | 287 |
| Table 6.9: US abrasives industry by number of companies and value of production, 1997-2007..... | 288 |
| Table 6.10: USA: exports of fused aluminium oxide, 2004-2008 (tonnes)..... | 296 |
| Table 6.11: USA: Exports of brown fused aluminium oxide, 2007-2008 (tonnes and \$)..... | 297 |
| Table 6.12: USA: Imports of crude brown fused aluminium oxide (BFA), | |

| | |
|--|-----|
| 2007-2008 (tonnes and \$) | 297 |
| Table 6.13: USA: imports of refined brown fused aluminium oxide (RBAO), 2006-2007 (tonnes and \$) | 297 |
| Table 6.14: USA: imports of ground and refined aluminium oxide, 2007-2008 (tonnes and \$) | 298 |
| Table 6.15: Price of crude silicon carbide, USA and Canada, 2004-2008 (\$ per ton) | 301 |
| Table 6.16: USA: imports of silicon carbide, 2001-2008 (tonnes)..... | 301 |
| Table 6.17: USA: imports of crude silicon carbide, 2006-2007 (tonnes and thousands of \$) .. | 303 |
| Table 6.18: USA: imports of ground and refined silicon carbide, 2006-2007 tonnes and thousands of \$) | 303 |
| Table 6.19: USA: net import reliance as a percentage, 2001-2007 | 303 |
| Table 6.20: USA: exports of silicon carbide, 2001-2008 (tonnes)..... | 303 |
| Table 6.21: USA: exports of crude silicon carbide, 2006-2007 (tonnes and thousands of \$) .. | 304 |
| Table 6.22: USA: exports of ground and refined silicon carbide, 2006-2007 (tonnes and thousands of \$) | 305 |
| Table 6.23: USA: apparent consumption of silicon carbide, 2001-2008 (tonnes) | 305 |
| Table 6.24: USA: prices for fused aluminium oxide and silicon carbide, 2003-2009 (\$ per tonne) | 306 |
| Table 6.25: USA: production, trade and consumption of synthetic diamond, 2001-2008 (millions of carats)..... | 318 |
| Table 6.26: USA: exports of synthetic diamond stones (kg and thousands of \$) | 318 |
| Table 6.27: USA: imports of synthetic diamond dust, 2006-2007 (kg and thousands of \$) | 319 |
| Table 6.28: USA: re-exports of synthetic diamond, 2006-2007 (kg and thousands of \$) | 320 |
| Table 6.29: Estimated world production of synthetic industrial diamond by country, 2003-2007 (thousands of carats) | 320 |
| Table 6.30: USA: imports of natural stone, 2006-2007 (thousands of carats and thousands of \$)..... | 325 |
| Table 6.31: USA: imports of natural diamond dust, 2006-2007 (kg and thousands of \$) | 326 |
| Table 6.32: USA: exports of natural diamond dust and powder (kg and thousands of \$) | 327 |
| Table 6.33: USA: re-exports of natural industrial diamond stone, 2006-2007 (thousands of carats and thousands of \$) | 327 |
| Table 6.34: US: re-exports of natural diamond dust and powders, 2006 and 2007 (thousands of carats and thousands of \$) | 328 |
| Table 6.35: USA: imports of industrial diamond, 2008 (\$) | 328 |
| Table 6.36: USA: exports of natural industrial diamond stone, 2008 (\$ and kg) | 329 |
| Table 6.37: USA: re-exports of diamond, 2008 | 330 |
| Table 6.38: Estimated world production of natural diamond, 2003-2007 (kg) | 330 |
| Table 6.39: USA: garnet production, 2003-2008 (tonnes and thousands of \$) | 331 |
| Table 6.40: World production of natural garnet, 2008 | 332 |
| Table 6.41: USA: silica sand production, 2007..... | 336 |
| Table 6.42: USA: production of tripoli (tons) | 338 |
| Table 6.43: USA: exports of bonded abrasives, 2008 | 342 |
| Table 6.44: USA: imports of bonded abrasives, 2008 | 343 |
| Table 6.45: USA: re-exports of bonded abrasives, 2008..... | 344 |
| Table 6.46: USA: exports of grinding wheels containing conventional abrasives, 2008..... | 344 |
| Table 6.47: USA: imports of grinding wheels containing conventional abrasives, 2008..... | 345 |
| Table 6.48: USA: exports of diamond and CBN grinding wheels, 2008..... | 346 |
| Table 6.49: USA: imports of diamond and CBN grinding wheels, 2008..... | 346 |
| Table 6.50: USA: re-exports of superabrasives products, 2008 | 347 |
| Table 6.51: USA: production of coated abrasives, 2007 (\$ million) | 358 |
| Table 6.52: USA: exports of cloth-backed coated abrasives belts, 2008..... | 361 |
| Table 6.53: USA: imports of fabric backed coated abrasive belts, 2008..... | 363 |
| Table 6.54: USA: re-exports of fabric-backed coated abrasive belts, 2008 | 364 |
| Table 6.55: USA: exports of paper-backed coated abrasives, 2008..... | 365 |
| Table 6.56: USA: imports of paper-backed coated abrasives, 2008..... | 365 |

| | |
|--|-----|
| Table 6.57: USA: re-exports of paper-backed coated abrasives, 2008 | 366 |
| Table 6.58: USA: exports of other coated abrasives products (nonwoven and other products), 2008 | 366 |
| Table 6.59: USA: imports of other coated abrasive products, 2008..... | 367 |
| Table 6.60: USA: re-exports of other coated abrasive products, 2008 | 368 |
| Table 6.61: Blasting media brand names..... | 378 |
| Table 6.62: USA: shipments of metallic abrasives, 2006-2008 | 381 |
| Table 6.63: USA: imports of metal abrasives, 2006-2008 | 382 |
| Table 6.64: USA: exports of metal abrasives, 2006-2008 | 383 |
| Table 6.65: US producers of metallic abrasives, 2008 | 383 |
| Table 6.66: Canada: exports of bonded abrasives, 2008 | 404 |
| Table 6.67: Canada: imports of bonded abrasives, 2008 | 405 |
| Table 6.68: Canada: exports of coated abrasives, 2008 | 406 |
| Table 6.69: Canada: imports of coated abrasives, 2008 | 407 |
| Table 6.70: Mexico: exports of abrasive minerals, 2008 | 411 |
| Table 6.71: Mexico: imports of abrasive minerals, 2008 | 411 |
| Table 6.72: Mexico: exports of bonded abrasives (diamond), 2008 | 412 |
| Table 6.73: Mexico imports of bonded abrasives (diamond), 2008 | 413 |
| Table 6.74: Mexico: exports of bonded abrasives (conventional), 2008 | 414 |
| Table 6.75: Mexico: imports of bonded abrasives (conventional), 2008 | 415 |
| Table 6.76: Mexico: exports of bonded abrasives (natural), 2008 | 416 |
| Table 6.77: Mexico: imports of bonded abrasives (natural), 2008 | 416 |
| Table 6.78: Mexico: coated abrasives, fabric-backed, 2008..... | 417 |
| Table 6.79: Mexico: imports of coated abrasives, fabric-backed, 2008 | 418 |
| Table 6.80: Mexico: exports of coated abrasives paper-backed, 2008..... | 419 |
| Table 6.81: Mexico: imports of coated abrasives, paper-backed, 2008..... | 420 |
| Table 6.82: Mexico: exports of other coated abrasives; 2008 | 421 |
| Table 6.83: Mexico: imports of other coated abrasives; 2008 | 422 |
| Table 6.84: Production capacities of the major Chinese producers of fused aluminium oxide..... | 427 |
| Table 6.85: Production capacities of major Chinese manufacturers of silicon carbide..... | 428 |
| Table 6.86: China: exports of abrasives minerals, 2008..... | 430 |
| Table 6.87: China: imports of abrasives minerals, 2008..... | 430 |
| Table 6.88: China: exports of bonded abrasives, 2008 | 431 |
| Table 6.89: China: imports of bonded abrasives, 2008 | 432 |
| Table 6.90: China: exports of coated abrasives, 2008 | 433 |
| Table 6.91: China: imports of coated abrasives, 2008 | 434 |
| Table 8.1: Europe (EU): predicted growth prospects for abrasive products by different product categories, 2008-2012 (€ million) | 499 |
| Table 8.2: USA: predicted growth prospects for abrasive products by different product categories, 2008-2012 (\$ million) | 500 |

TABLES

| | |
|--|-----|
| Figure 6.1: Relative size of main abrasive categories (%)..... | 287 |
| Figure 6.2: Chinese exports of aluminium oxide, 2007 (%) | 300 |
| Figure 6.3: USA: Major sources of imports of crude silicon carbide, 2008 (%) | 302 |
| Figure 6.4: Major sources of imports of crude silicon carbide, 2007 (%) | 302 |
| Figure 6.5: Major destinations of US exports of silicon carbide | 304 |
| Figure 6.6: Historical trends in prices of crude silicon carbide, 1916-2006 | 307 |
| Figure 6.7: Historical prices of industrial diamond, 1900-2007 (\$ million/ton) | 317 |
| Figure 6.8: Consumption of industrial diamond since 1900 (tonnes) | 318 |
| Figure 6.9: Industrial uses of garnet (worldwide)..... | 333 |
| Figure 6.10: US coated abrasives production by type, 2007 | 358 |
| Figure 6.11: USA: Metal abrasives production and consumption, 1916-2006 | 381 |
| Figure 6.12: Worldwide market shares for Interlayer dielectric(ID) and non-selective shallow trench insolation (STI) slurries | 390 |
| Figure 6.13: Selective shallow trench insolation (STI) slurry market share worldwide | 390 |
| Figure 6.14: Tungsten CMP slurry market share worldwide | 391 |
| Figure 6.15: Worldwide CMP slurry market share for (top) copper step 1, and (bottom) copper barrier | 391 |
| Figure 6.16: Copper barrier market shares worldwide..... | 392 |
| Figure 6.17. CMP polishing pad market share worldwide | 392 |
| Figure 6.18: Abrasives production in Canada by product type (%)..... | 402 |