

Perlite market Assessment, By Form [Crushed, Expanded, Block], By Application [Coatings, Insulation, Absorption, Matting Agent, Others], By End-user [Construction, Agriculture & Horticulture, Cosmetics, Food & Chemical, Others], By Region, Opportunities and Forecast, 2016-2030F

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Abstracts

Global perlite market size was 4351 kilotons in 2022, expected to reach 6908.71 kilotons in 2030 with a CAGR of 6% for the forecast period between 2023 and 2030. Perlites are versatile and chemically inert and have a wide range of applications in construction, cosmetics, food, and agriculture where the demand has significantly increased due to its functional characteristics. For instance, in 2022, the European Union agriculture industry generated an estimated gross value of around USD 237.86 billion, restructuring the market opportunities for perlites. Companies like Imerys and L'Oréal Paris have approved the perlite compound in their cosmetic products due to its exfoliating properties and high absorbency. For instance, according to the data published by the Cosmetics Europe Association, the value of the cosmetics and personal care market in Europe was USD 94.45 billion in 2022.

The versatile substance perlite has numerous applications, from a lightweight filler to a matting agent according to different sizes. Thus, perlite is extensively used as cryogenics, absorbing agent, agricultural additive, high-temperature insulation material, and others in various end-use industries, including building, construction, personal care, and cosmetics. The perlite market is driven by superior characteristics such as excellent exfoliating and high absorbency characteristics that make it ideal for use in the cosmetic industry. Perlites are also utilized as fire-resistant materials while constructing walls and floor tiles, driving market growth. In addition, the growth of the agriculture industry is

amplifying the adoption of perlite as the material is deployed in crops like wheat, corn, and rice, which provides them stability and is resistant to climatic change. Therefore, the rapid advancements in the end-use industries such as construction, cosmetics and personal care, and agriculture will continue to carry huge market growth potential throughout the projected forecast period.

Increasing Deployment of Perlite in the Construction Industry

Perlite is a naturally occurring substance that appears from glassy volcanic rock and is versatile due to its unique characteristics. The perlite product range has significant advantages in the construction industry as the material possesses enhanced delivery and excellent thermal insulation. Furthermore, perlites are chemically inert and have improved flow characteristics and workability for construction materials like plasters, cement, and mortars. The recent infrastructure upgrade projects, the development of new commercial buildings, and the increasing demand for affordable housing projects are driving the market growth.

For instance, in May 2022, the Biden administration cleared a huge amount of USD 550 billion to substantially upgrade various infrastructure projects including roads, bridges, and dams. Furthermore, a long bridge in Saudia Arabia is coming into existence, connecting the intersection with the Riyadh-Jeddah highway. In addition, as of November 2023, various commercial construction projects commenced in multiple countries are under the construction phase, including Bengaluru Retail and Entertainment Complex Development in India (project completion in the year 2025), Saya Status Shopping Mall in India (project completion in the year 2026), the new terminal at Montreal Saint-Hubert Airport in Canada (project completion in the year 2025), and Markisches Zentrum Redevelopment in Germany (project completion in the year 2024). According to the data released by the European Steel Association (EUROFER), in 2022, the production volume in the European Union's construction sector substantially grew by 4.8%. As a result, the booming construction activities at the global level are driving the adoption of perlite, which is amplifying the market growth.

The Rising Agriculture Activities is Supplementing the Market Growth

Several applications for perlite in the agriculture industry include soil amendment, specific ingredients, and top surface soil dressing. Perlite is considerably used for growing crops like wheat, corn, and rice as the crops are highly prone to water retention or low organic matter levels. Perlite is subsequently used before planting or transplanting, which assists in improving root growth and preventing moisture loss or

after harvesting to provide insulation and cooling effect.

For illustration, according to the data published by the United States Department of Agriculture, in 2022, crop cash receipts accumulated to around USD 278.1 billion, where the majority accounted for corn and soybeans valued at USD 150.9 billion. Moreover, according to the European Union, in 2022, the European Union agriculture industry generated an estimated gross value of around USD 237.86 billion. Hence, the growth of the agriculture industry driven by innovations to improve the yield of crops is fostering the adoption of perlite, thereby driving the market growth.

Incorporation of Perlite as an Effective Agent for Cosmetic Products

Processed perlite in the powdered form delivers excellent characteristics in cosmetic products. Perlite powder possesses impeccable exfoliating properties that remove dead skin cells and unclog pores, promoting a smoother complexion. Perlite also has a high absorbency property suitable for skincare formulation which is good for oily or acne-prone skin. For cosmetic products, including powders, foundations, and blushes, perlite assists in controlling shine by absorbing excess oil and imparting longer matte finishes to the surface.

For instance, Imerys has developed various grades of natural cosmetics from perlites that replace conventional polymer beads used in body scrubs, face washes, shower gels, and shampoos. The perlite-based products offered by Imerys are also suitable for sun care, skin care, and make-up applications that require high absorption properties. Henceforth, incorporating perlite as an effective agent for cosmetic products fosters market growth.

Asia Pacific Region is Dominating the Perlite Market

Numerous factors, such as the exponential rise of the construction industry across China, Japan, and India, have increased the demand for perlite products. Perlite is extensively used as a filler for ceiling tiles, sound-cancellation walls, and structure heating solutions. Implementing government policies to build structures with massive strength and sustainable foundation in various countries across the Asia Pacific fosters the adoption of perlite.

For instance, the overall infrastructure investment during the 14th Five-Year Plan (2021-2025) in China will reach about USD 4.2 trillion. The 14th Five-Year Plan in China emphasizes increasing green building development, more than 350 million square

meters of buildings renovation, and the 50 million square meters plus of buildings construction with net zero energy consumption. Henceforth, the rise in construction activities is amplifying the adoption of the perlite-based product range, which, in turn, is spurring the market's growth.

Impact of COVID-19

The outbreak of COVID-19 resulted in the shutdown of the construction and cosmetic industry deteriorated the economic stability badly in 2020. The unavailability of resources and manpower halted the construction of building-related projects in the first half of 2020. The strict lockdowns imposed by the government entities significantly deteriorated the construction industry, directly reducing the perlite market and its consumption. In addition to the construction industry, horticulture, and agriculture practices were also severely impacted which negatively contributed to the market potential for perlite across severely hit countries. Thus, the perlite market growth was lowered during the COVID-19 pandemic but the ease in restrictions and removal of lockdowns has accelerated the growth of the perlite industry after the commencement of industrial and construction projects.

Key Players Landscape and Outlook

The leading global companies in the perlite market are Imerys, Aegean Perlites SA, The Schundler Company, and Keltech Energies Limited. For instance, Aegean Perlites SA is a leading manufacturer of expanded perlite that subsequently provides better aeration and optimum moisture retention for plant growth and works at a reasonably stable pH. During hydroponic cultivation (a non-soil medium) expanded-filled grow bags enable the delivery of controlled amounts of water and specific nutrients to the plants consequently optimizing root development. They are also a leading manufacturer of perlite for construction materials that lead to improved flow characteristics and workability of bulk products like cement, mortars, and plasters.

In April 2020, Imerys, a leading manufacturer of perlite acquired Cornerstone Industrial Minerals Corporation, a manufacturer of perlite in the United States. The focus of the acquisition was to increase the market share at the global level.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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