

# **Diatomaceous Earth Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application**

<https://marketpublishers.com/r/D42E112B480FEN.html>

Date: September 2025

Pages: 115

Price: US\$ 3,200.00 (Single User License)

ID: D42E112B480FEN

## **Abstracts**

### Diatomaceous Earth Market Summary

Diatomaceous earth (DE), also known as diatomite, is a naturally occurring sedimentary material composed of the fossilized remains of diatoms, single-celled aquatic algae. It is primarily made of amorphous silica and is characterized by a porous honeycomb-like structure containing thousands of micropores and nanopores. These features give diatomite unique properties such as high permeability, low density, high surface area, and excellent filtration capacity, making it suitable for diverse applications across industries. The global diatomaceous earth market is expected to reach a value in the range of USD 1.5–2.5 billion in 2025, with an estimated compound annual growth rate (CAGR) between 2.1% and 4.1% through 2030. Market expansion is driven by rising demand in filtration, filler applications, environmental management, and energy sectors. The material is valued not only for industrial uses but also for sustainable solutions in agriculture, waste management, and renewable fuels, aligning with broader global trends toward ecological responsibility.

### Regional Market Outlook

North America is one of the most established markets for diatomaceous earth, with the United States being a leading producer. Deposits in California, Nevada, and Oregon supply a wide range of industries, especially food and beverage filtration, construction fillers, and environmental absorbents. Growth in North America is expected to remain steady, at around 2.0–3.0% CAGR, supported by well-developed processing facilities and stringent environmental regulations that encourage the use of eco-friendly absorbents.

Europe represents another significant region, with notable deposits in Denmark, France, and Spain. Demand in Europe is bolstered by established food processing, brewing, and pharmaceutical industries. Regulatory frameworks encouraging the use of safe, natural filtration and absorbent materials further support moderate growth, with a CAGR projected at 1.8–2.8%.

Asia-Pacific (APAC) is experiencing the fastest growth, projected at 3.0–5.0% CAGR, due to increasing industrialization, rising demand in food and beverage sectors, and expanding applications in construction and agriculture. China, in particular, has emerged as both a major producer and consumer, with domestic companies such as Jilin Yuantong Mineral Co. Ltd. expanding production capacity. Japan and India also represent growing consumption hubs, driven by demand for filtration in brewing and water purification.

Latin America shows steady development, supported by deposits in Argentina, Chile, and Mexico. The region benefits from growing food and beverage industries and investments in oil and gas filtration. Projected growth stands at 2.2–3.2% CAGR.

Middle East and Africa (MEA) remain emerging markets, where diatomite use is increasing in construction, water treatment, and oilfield operations. Market growth is anticipated at 2.0–3.0% CAGR, reflecting gradual industrial adoption and infrastructure development.

## Application Analysis

### 1. Filtration (CAGR 2.5–4.0%):

Filtration remains the largest application of diatomaceous earth, particularly in the purification of beverages such as beer, wine, and spirits, as well as edible oils and water treatment. DE's natural structure allows high-capacity retention of fine particles without altering taste or chemical composition, making it irreplaceable in many industries.

### 2. Refractory and Thermal Insulation (CAGR 1.5–2.5%):

Diatomaceous earth is utilized as a lightweight insulating material due to its high porosity and heat resistance. It is commonly used in fire-resistant panels, thermal

bricks, and other insulation products. Although this is a mature segment, its role in energy efficiency in construction and industrial furnaces continues to sustain demand.

### 3. Filler (CAGR 2.2–3.5%):

Diatomite serves as a functional filler in paints, adhesives, plasters, plastics, rubbers, cosmetics, and pharmaceuticals. Growth is driven by increasing demand for lightweight, cost-effective, and high-performance fillers that enhance strength, stability, and durability.

### 4. Absorbents (CAGR 2.8–4.2%):

DE is widely applied in oil and chemical spill management, waste treatment, biodiesel refining, and household applications such as refrigeration and odor control. It acts as a “floor dry” or “spill absorbent” in industrial settings. In food preservation, diatomaceous earth helps absorb ethylene gas and moisture, extending shelf life. In the agricultural sector, it is used as a pesticide carrier. The growing need for sustainable, cost-effective absorbents strongly supports this segment’s growth.

### 5. Others (CAGR 2.0–3.0%):

These include diverse uses in ceramics, paper coating, ink production, pharmaceuticals, and specialty chemicals. Incremental demand is linked to innovation in materials science and niche applications.

## Type Characteristics

Diatomaceous earth products are broadly categorized into natural and calcined grades. Natural DE is typically used in agricultural, absorbent, and filler applications, whereas calcined DE, which is heat-treated, finds more use in filtration and refractory products due to enhanced strength and thermal resistance. The increasing adoption of high-purity, tailored DE grades is expected to support further specialization across applications.

## Competitive Landscape

Key players in the diatomaceous earth market include Imerys, Dicalite Management Group, Kaolin AD, U.S. Silica, Oil-Dri Corporation of America, 20 Microns Ltd, and Jilin Yuantong Mineral Co. Ltd.

Imerys operates globally with deposits in the United States, Mexico, Chile, Peru, France, Spain, and China. Its Lompoc, California mine is one of the world's largest marine diatomite deposits and represents a strategic advantage in both scale and quality.

U.S. Silica Holdings Inc. maintains significant DE operations in Nevada and Oregon, supplying filtration and absorbent products to food, beverage, and industrial customers.

Dicalite Management Group is recognized for diversified mineral solutions, including DE tailored for construction, horticulture, and industrial absorbent applications.

Jilin Yuantong Mineral Co. Ltd. in China has expanded its production capacity to 300,000 tons annually, supporting the growing domestic demand.

Oil-Dri Corporation of America leverages DE in pet care absorbents and industrial spill management, integrating its presence in the broader absorbent materials market.

The competitive landscape is moderately consolidated, with global players holding significant reserves and vertically integrated supply chains. Regional firms compete on cost efficiency and proximity to end-users.

## Value Chain and Industry Structure

The diatomaceous earth industry value chain begins with the extraction of diatomite ore, which is then processed into various grades through crushing, drying, calcination, and milling. Producers add value by tailoring particle size, purity, and treatment methods to meet specific industrial standards. End-use industries include food and beverage processing, construction, agriculture, chemicals, and energy. Logistics and distribution networks play a crucial role due to the bulk nature of the product, while downstream industries demand strict compliance with quality and safety standards.

## Opportunities and Challenges

Opportunities:

Rising demand for eco-friendly filtration and absorbent materials in food safety, oil spill management, and environmental protection.

Growth in renewable fuels and biodiesel production, where DE is used as a refining aid.

Expanding applications in agriculture, both as a natural pesticide carrier and as a soil conditioner, in line with sustainable farming practices.

Innovation in functional fillers for high-performance materials, including lightweight composites and cosmetics.

#### Challenges:

Substitution risks from alternative filtration technologies, such as membrane filtration and synthetic absorbents, which could impact demand in certain segments.

Geological limitations: DE deposits are geographically concentrated, and extraction costs vary significantly with ore quality and accessibility.

Regulatory compliance: Food-grade and pharmaceutical-grade DE require strict adherence to purity and safety standards, adding to production complexity and cost.

Environmental and community concerns related to mining operations, particularly in ecologically sensitive regions, may constrain expansion.

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