



Freedonia Focus Reports  
Global Collection

# Silicones: Europe

October 2021



**BROCHURE**  
CLICK TO ORDER  
FULL REPORT

[www.freedoniafocusreports.com](http://www.freedoniafocusreports.com)

# Table of Contents

---

<b>1. Highlights</b>	<b>3</b>
<b>2. Market Environment</b>	<b>4</b>
Historical Trends	4
Key Economic Indicators	6
COVID-19 Impact on the Silicones Industry	7
Sustainability Initiatives	9
Key Technology Trends & Opportunities	10
Demand by Country	12
<b>3. Segmentation &amp; Forecasts</b>	<b>14</b>
Products	14
Fluids	15
Elastomers	16
Resins	17
Gels, Foams, & Pastes	17
Markets	19
Construction	20
Transportation	21
Personal Care	22
Electrical Equipment	23
Chemical	23
Other Markets	24
<b>4. Industry Structure</b>	<b>26</b>
Industry Characteristics	26
Market Share	27
Wacker Chemie	28
Dow	29
Momentive Performance Materials	29
<b>5. About This Report</b>	<b>31</b>
Scope	31
Sources	32
Industry Codes	33
Freedonia Methodology	33
Resources	35

# List of Tables & Figures

---

Figure 1   Europe: Key Trends in Silicone Demand, 2020 – 2025	3
Figure 2   Europe: Silicone Demand Trends, 2010 – 2020	4
Table 1   Europe: Key Indicators for Silicone Demand, 2010 – 2025 (2019US\$ bil)	6
Figure 3   Europe: Silicone Demand by Country, 2020 (%)	12
Figure 4   Europe: Silicone Demand by Product, 2010 – 2025 (US\$ bil)	14
Table 2   Europe: Silicone Demand by Product, 2010 – 2025 (US\$ mil)	14
Figure 5   Europe: Silicone Demand by Product, 2010 – 2025 (%)	18
Figure 6   Europe: Silicone Demand by Market, 2010 – 2025 (US\$ bil)	19
Table 3   Europe: Silicone Demand by Market, 2010 – 2025 (US\$ mil)	19
Figure 7   Europe: Silicone Demand by Market, 2010 – 2025 (%)	25
Figure 8   Europe: Silicone Market Share by Company, 2020 (%)	27
Table 4   Europe: Selected Suppliers to the Silicone Market	30
Table 5   Countries in Western Europe	32
Table 6   Countries in Eastern Europe	32
Table 7   HS Codes Related to Silicone	33
Table 8   NACE Codes Related to Silicone	33

# About This Report

---

## Scope

This report forecasts to 2025 silicone demand in nominal US dollars at the manufacturer level in Europe. Total demand is segmented by product in terms of:

- fluids
- elastomers
- resins
- gels, foams, and pastes

Total demand is also segmented by market as follows:

- construction
- transportation
- personal care
- electrical equipment
- chemical
- other markets such as electronic products, medical and healthcare, and machinery

To illustrate historical trends, total demand is provided in annual series from 2010 to 2020; the various segments are reported at five-year intervals for 2010, 2015, and 2020.

For the purposes of this report, silicones are defined as polymers of silicon and oxygen. To avoid double counting, silicone demand is determined at the producer level and includes only basic products such as elastomers, fluids, resins, and gels. Siloxanes used as silicone products themselves (as in personal care product formulations) are also included. Foam control agents used in foam insulation are included in the chemicals – rather than the construction – market.

Excluded are:

- downstream silicone products such as adhesives, sealants, lubricants, defoamers, and molded rubber goods
- siloxanes used as raw materials for silicones, although siloxanes used as silicone products themselves (as in personal care product formulations) are included
- silanes, including chlorosilane intermediates and silane coupling agents, which are not defined as silicone polymers
- fluids used as intermediates in the production of other silicone product types, including gels, elastomers, and resins

For any given historical year, US dollar amounts are obtained from values expressed in the applicable local currency. These local currency values are converted to US dollars at the average annual exchange rate for that year. For forecast years, the US dollar amounts assume the same annual exchange rate at that prevailing in 2020.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

For the purposes of this report, Europe encompasses the following countries:

**Table 5 | Countries in Western Europe**

Andorra	Germany*	Italy*	Portugal
Austria	Gibraltar	Jersey	Saint Pierre and Miquelon
Belgium	Greece	Liechtenstein	San Marino
Channel Islands	Greenland	Luxembourg	Spain*
Denmark	Guernsey	Malta	Sweden
Faeroe Islands	Iceland	Monaco	Switzerland
Finland	Ireland	Netherlands	United Kingdom*
France*	Isle of Man	Norway	Vatican City

\*Major silicone markets

Source: The Freedonia Group

**Table 6 | Countries in Eastern Europe**

Albania	Hungary	Romania
Belarus	Latvia	Russia*
Bosnia and Herzegovina	Lithuania	Serbia
Bulgaria	Macedonia	Slovakia
Croatia	Moldova	Slovenia
Czech Republic	Montenegro	Ukraine
Estonia	Poland	

\*Major silicone market

Source: The Freedonia Group

## Sources

*Silicones: Europe* (FE55022) is based on *Global Silicones*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers

- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

**Table 7 | HS Codes Related to Silicone**

HS Code	Definition
3910	Silicones in primary forms

Source: United Nations Statistics Division

**Table 8 | NACE Codes Related to Silicone**

NACE Code	Definition
20.16	Manufacture of plastics in primary forms
20.17	Manufacture of synthetic rubber in primary forms
22.00	Manufacture of rubber and plastic products

Source: European Commission

## Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

## Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

## Resources

### The Freedonia Group

*Global Silicones*

### Freedonia Industry Studies

*Gaskets & Seals*

*Global Adhesives & Sealants*

*Global Architectural Paint*

*Global Construction Chemicals*

*Global Disposable Medical Supplies*

*Global Electric Power Transmission & Distribution Equipment*

*Global Gaskets & Seals*

*Global Lubricants*

*Global Medical Thermoplastic Elastomers*

*Global Paint & Coatings*

*Global Rubber Processing Chemicals*

*Global Thermoplastic Elastomers*

*Liquid-Applied Roof Coatings*

*Liquid Silicone Rubber*

### Freedonia Focus Reports

*Commercial Building Construction: United States*

*Construction: United States*

*COVID-19 Market Impact Analysis*

*Electronic Components: United States*

*Lubricants: Europe*

*Manufacturing: United States*

*Medical Equipment & Supplies: United States*

*Medical Services: United States*

*Motor Vehicles: Europe*

*Paint & Coatings: Europe*

*Paint & Coatings: United Kingdom*

*Renewable Energy: United States*

*Rubber Processing Chemicals: Europe*

*Thermoplastic Elastomers: Europe*

*Transport Equipment: United States*

### Freedonia Custom Research



## Trade Publications

*Adhesives & Sealants Industry*

*Chemical Engineering*

*Chemical Week*

*European Rubber Journal*

*Global Cosmetic Industry*

*ICIS Chemical Business*

*Plastics News*

*Rubber & Plastics News*

## Agencies & Associations

European Chemicals Agency

European Environment Agency

Eurostat

Global Silicones Council

International Monetary Fund

Organisation for Economic Co-operation and Development

Plastics Industry Association

Silicones Environmental, Health, and Safety Center

Silicones Europe

United Nations Comtrade

United Nations Environment Programme

World Bank