



Freedonia Focus Reports
US Collection

Pigments:

United States

November 2017



CLICK TO ORDER
FULL REPORT

BROCHURE

CLICK TO ORDER
FULL REPORT

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Market Environment	4
Historical Trends	4
Key Economic Indicators	6
Trade	7
Pricing Trends	9
Environmental & Regulatory Factors	12
Application Overview	13
3. Segmentation & Forecasts	15
Products	15
Titanium Dioxide	16
Other Inorganic White Pigments	18
Organic	20
Carbon Black	22
Other Inorganic Pigments	24
4. Industry Structure	27
Industry Characteristics	27
Market Leaders	28
BASF	28
The Chemours Company	29
Venator Materials	29
5. About This Report	31
Scope & Method	31
Sources	32
Industry Codes	32
Resources	33

List of Tables & Figures

Figure 1 Key Trends in US Pigment Demand, 2016-2021	3
Figure 2 US Pigment Demand Trends, 2006-2016	4
Table 1 Key Indicators for US Pigment Demand; 2006, 2011, 2016, 2021 (US\$ bil)	6
Figure 3 US Pigment Trade, 2006-2016 (US\$ mil)	7
Table 2 US Pigment Exports, 2006-2016 (US\$ mil)	7
Table 3 US Pigment Imports, 2006-2016 (US\$ mil)	8
Figure 4 US Producer Price Indexes for Select Pigments, 2006-2016 (2006=100)	9
Table 4 US Producer Price Indexes for Select Pigments, 2006-2016 (2006=100)	9
Figure 5 US Carbon Black Producer Price Index & Brent Crude Oil Prices, 2006-2016	10
Figure 6 US Titanium Dioxide Pigment Demand & Producer Price Index, 2006-2016	11
Figure 7 US Pigment Demand by Product; 2006-2016, 2021 (US\$ mil)	15
Table 5 US Pigment Demand by Product & Total Shipments; 2006-2016, 2021 (US\$ mil)	15
Figure 8 US Pigment Shipments & Demand; 2006-2016, 2021 (US\$ mil)	16
Figure 9 US Titanium Dioxide Pigment Demand & Paint & Coatings Shipments; 2006-2016, 2021	17
Figure 10 US Other Inorganic White Pigments & Titanium Dioxide Pigment Demand; 2006-2016, 2021	19
Figure 11 US Organic Pigments Demand & Printing Ink Shipments; 2006-2016, 2021	21
Figure 12 US Carbon Black Pigments Demand & Printing Ink Shipments; 2006-2016, 2021	23
Figure 13 US Pigment Demand by Product; 2006-2016, 2021 (%)	26
Table 6 Leading Suppliers to the US Pigment Market by Product	28
Table 7 Industry Codes Related to Pigments	32

About This Report

Scope & Method

This report forecasts US pigments demand and shipments in nominal US dollars at the manufacturers' level to 2021. Total demand is segmented by product in terms of:

- titanium dioxide
- other inorganic whites such as calcium carbonates, kaolin, and talc
- organic
- carbon black
- other inorganic pigments such as iron oxides, cadmium yellows, and chromium oxide greens.

Demand and shipments figures are provided in terms of dry or pre-dispersion forms. Pigments in dispersion form (sometimes called color concentrates or masterbatches) are excluded. In addition, pigments used for purposes other than coloring – such as reinforcing additives in rubber, raw materials for catalysts, and antifoulant and anticorrosive additives in coatings – are also excluded. For example, the use of carbon black in rubber applications is excluded from this report, as carbon black is specified in rubber primarily as a performance modifier rather than as a pigment. Dyes are excluded from the scope of this report. Re-exports of pigments are excluded from demand and trade figures.

To illustrate historical trends, total demand, shipments, the various segments, and trade are provided in annual series from 2006 to 2016.

This report 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.

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

Sources

Pigments: United States (FF35015) represents the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international 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 | Industry Codes Related to Pigments

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industry Codes	
325131	Inorganic Dye and Pigment Manufacturing	2816	Inorganic Pigments
325132	Synthetic Organic Dye and Pigment Manufacturing	2821	Plastics Materials, Synthetic Resins, and Nonvulcanizable Elastomers
325182	Carbon Black Manufacturing	2851	Paints, Varnishes, Lacquers, Enamels, and Allied Products
325211	Plastics Material and Resin Manufacturing	2865	Cyclic Organic Crudes and Intermediates, and Organic Dyes and Pigments
325510	Paint and Coating Manufacturing	2893	Printing Ink
325910	Printing Ink Manufacturing	2895	Carbon Black

Source: US Census Bureau

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

Freedonia Industry Studies

Architectural Paint Market in the US, February 2017

Paint & Coatings: US Market Forecasts, February 2017

World Paint & Coatings, June 2016

Freedonia Focus Reports

Adhesives & Sealants: United States

Commercial Printing: United States

Dyes & Organic Pigments: United States

Paint & Coatings: United States

Thermoplastic Resins: United States

Titanium: United States

World Paint & Coatings

Freedonia Custom Research

Trade Publications

Chemical Week

Coatings World

ICIS Chemical Business

Ink World

Paint & Coatings Industry

Agencies & Associations

Color Pigments Manufacturers Association

International Paint and Printing Ink Council

National Association of Printing Ink Manufacturers

Occupational Safety and Health Administration

United States Census Bureau

United States Department of Agriculture

United States Environmental Protection Agency

United States Food and Drug Administration

United States Geological Survey

United States International Trade Commission