Color pigments demand to increase 5.0% per year through 2007

US demand for organic (encompassing organic, inorganic and specialty types) in forecast to rise 3.3 percent per year to $3.6 billion in 2007, with volume exceeding one billion pounds. The demand for inorganic pigments will continue to grow, mainly due to the phase out of heavy metal types. However, opportunities will arise for certain inorganic products, such as industrial grade ultramarine, complex inorganic and bismuth vanadates. Growth in inorganic pigments will lag the industry average, advancing 3.6 percent per annum to $1.4 billion in 2007, primarily due to the continued displacement of heavy metal pigments by organic types. Nevertheless, improvements in their physical properties will result in increased market share. Organic pigments, while offering a wider color range, are also environmentally acceptable colorants as replacements for heavy metal inorganic pigments. Increases will also be driven by higher growth in wide format printers, particularly those inks designated for anti-forgery, anti-counterfeiting and other security applications; and pigments designated for use in digital ink formulations, particularly those inks designated for digital textile printers.

High performance pigments to spur organic growth

Organic pigments will also record above average growth, rising 5.6 percent per year to $1.1 billion in 2007. Gains will be spurred by the use of these environmentally acceptable colorants as replacements for heavy metal inorganic pigments. Increases will also be driven by higher growth in wide format printers, particularly those inks designated for anti-forgery, anti-counterfeiting and other security applications; and pigments designated for use in digital ink formulations, particularly those inks designated for digital textile printers.

Pigments: Organic, Inorganic & Specialty

US Industry Study with Forecasts to 2007 & 2012

Study #1712 • October 2003 • $1712 • 271 Pages

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Color pigments demand to increase 5.0% per year through 2007

US demand for pigments (encompassing organic, inorganic, and specialty types) is forecast to reach 3.6 billion pounds in 2007, with volume exceeding one billion pounds in 2004. Printers and Other (Packaging) Industries remain the largest market, with Printing Inks and Printing Pressing as the leading users of pigments. Prices are forecast to advance 4.5% per year, to $8.7 billion in 2007. This market is also forecast to grow 5.0% per year, with the value reaching $8.4 billion in 2007. Pigment value gains will be driven by a shift in usage to higher performance, lighter weight pigments and coatings. Sales of inorganic pigments will remain relatively weak due to the continuing heightened consumer appeal. Demand for inorganic pigments will remain moderate as a result of color trends favoring transparent materials. Complex inorganics will be spurred by the use of these pigments, particularly those inks designated for high performance, lightfastness and chemical resistance. 8% sales tax)

Organic pigments will also record above average growth, rising 6.5 percent per year to $1.7 billion in 2007. Gains will be spurred by the use of these environmentally acceptable colors as replacements for heavy metal inorganic pigments. Increases will also be driven by greater use of high performance, inks, powder coatings, and radiation-curable inks and coatings.

Some inorganics to see healthy growth

Growth in inorganic pigments will lag the industry average, advancing 3.6 percent per year to $1.4 billion in 2007, primarily due to the continued replacement of heavy metal pigments by organic types. Nevertheless, there will be continued growth in the use of certain inorganic pigments. Industrial grade ultramarine, complex inorganics will gain use in plastics due to color trends favoring transparent materials. Complex inorganics will find greater use due to their excellent lightfastness and thermal resistance. Complex inorganics will also find use as a more cost effective, relatively alternative to heavy metal pigments in ink, ink inks, and paper coating materials.

Links to remain largest market, lead growth

Pigments find use in a myriad of products, including automotive finishes, plastic children’s toys, plastic packaging, painting vehicles, ceramic tile and mythologies. Primarily, it will remain the largest market for pigments, reaching $1.2 billion in 2007. This market is also expected to record the fastest growth, with annual gains of 8.0 percent. Growth will be boosted by greater use of metallic inks in packaging and printing, decorative graphics, phosphorescent pigments in anticounterfeiting, and other security applications. Pigment grades designed for use in digital ink formulations, particularly those inks designated for sublimation printing.
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Very truly yours,

Jeffrey Weiss, CEO

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**SAMPLE PAGE**

**Pigments Study**

**Pigment Demand by Type & Segment (millions of dollars)**

<table>
<thead>
<tr>
<th>Year</th>
<th>Inorganic Pigments</th>
<th>Organic Pigments</th>
<th>Total</th>
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</tbody>
</table>

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**MARKETS**

The Markets Section analyses trends and considers the threats and opportunities in each major market.

**Pigments**

The Pigments segment provides data for historical years and forecast growth to 2007 and 2012.

---

**SPECIALTY PIGMENTS**

Pearlecent pigment demand is forecast to increase 5.8 percent per year to $175 million in 2007. Pearlecent pigment demand growth is forecast to be driven by decreasing costs, which enable the pearlecent pigment to be cost-competitive with metallic pearlecent pigment in many applications.

---

**COMPANY PROFILES**

Clariant International Limited

N00219

The Company is active in the US pigments industry through the Pigmions and Additives, Pigments, and Textile Leather and Paper Chemicals segments. These products produce a wide variety of pigments, dyes, and other products, among other products. In the US, Clariant International Limited is the largest supplier of pigments for the US market (as of 2002), accounting for approximately 30% of the total market. At that time, the Company

---

**Pigments**

The Pigments segment provides data for historical years and forecast growth to 2007 and 2012.
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Pigments: Organic, Inorganic & Specialty

PIGMENTS:

Paints & Coatings: Pigment Demand by Type & Segment (million dollars)

<table>
<thead>
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<tr>
<td>Total Pigments</td>
<td>383</td>
<td>493</td>
<td>578</td>
<td>842</td>
<td>1189</td>
</tr>
</tbody>
</table>

MARKETS

The Markets section analyzes trends and considers the threats and opportunities in each major market.
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Very truly yours,

Jeffrey Weiss, CEO

Pigments

Pigment demand is forecast to increase 7.6 percent per year to $1,175 million in 2007. Pigment powder demand, primarily for paint, is expected to rise 7.6 percent per year to 13 million pounds in 2007. Nevertheless, gains will be supported by the introduction of new products, featuring improved hiding ability and processing characteristics.

The remainder of pearlescent pigment demand is linked to its uses in plastic and specialty applications. Sanasar luster pigments account for the majority of pearlescent pigment demand, roughly 90 percent in 2002. The usual pigment production for its relatively low price, stability and weather resistance.

The use of pearlescent pigment in plastic and specialty applications continues to account for the majority of pearlescent pigment demand, roughly 90 percent in 2002. A fine orultramarine pigment production for its relatively low price, stability and weather resistance.

Clariant International Limited

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